

**City of Bloomington
Common Council**

**2019 Jack Hopkins Social Services Funding
Program Applications**

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

City of
Bloomington
Indiana

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To: Members of the 2019 Jack Hopkins Social Services Funding Committee
From: Council Office
Re: Applications for 2019 Jack Hopkins Social Services Funding
Date: 17 April 2019

Included herein, please find all applications for 2019 Jack Hopkins Funding. Please recall that the Committee will meet on **Monday, 22 April at 6:00 pm** to review all applications. 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 agency to answer in the course of their presentation. Committee members should also be prepared to disclose any conflicts of interest. See below.

This year, 30 agencies submitted timely and complete applications for Hopkins funding; one agency submitted an application after the deadline. The request for applications was issued on 04 March and applications were due by 01 April. A reminder was issued on 13 March and a Technical Assistance meeting was held on 19 March 2019. 11 agency representatives attended the Technical Assistance meeting.

As is typical, the requests for funding exceeds the money the Hopkins Committee has available to allocate. Collectively, the requests total **\$617,394.46**. This year, the Committee has approximately **\$313,387.18** to distribute (\$305,000 appropriated for 2019 plus \$8,387.18 in unused 2018 monies)¹ – a difference of approximately \$304,007. Should the Committee wish to recommend allocation of *all* available monies, including reverted 2018 monies, know that the Committee will need to ask the Mayor for an appropriation ordinance to do so. The Controller's Office recommends that the Committee make such 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.

¹ Note that this number is subject to final confirmation by the Controller's Office. \$1,707 was not spent by the Committee in 2018 and of the funds allocated, agencies did not use approximately \$6,680.

Conflict of Interests

In the interest of Monday's 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 Committee member has a pecuniary interest in, or derives a profit from, one of any of the current applications, then s/he 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 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.

2019 JACK HOPKINS SOCIAL SERVICES FUNDING SCHEDULE

Highlighted fields = Committee meetings

MARCH

| | |
|---------------------------|--|
| 04 (Monday) | Solicitations issued |
| 19 (Tuesday, 4p) | Technical Assistance Meeting, McCloskey Room |
| 01 April (Monday, by 4pm) | Applications due |

APRIL

| | |
|------------------------------------|---|
| 17 (Wednesday) (no later than 5pm) | Applications sent to Committee |
| 22 (Monday, 6:00pm) | Committee meets to discuss applications, Council Library (#110, City Hall) |

MAY

| | |
|-------------------------------|--|
| 02 (Thursday, 5:30 pm) | Agency Presentations, Council Chambers (#115) |
| 06 (Monday, by Noon) | Committee members submit recommended allocations and comments. |
| 09 (Thursday, 6:30pm) | Pre-allocation meeting, Council Library (#110) |
| 13 (Monday, 5:30pm) | Allocation Hearing, McCloskey Room (#135) |

JUNE

| | |
|-----------------------------|---|
| early June | Agencies sign funding agreements |
| 04 (Tuesday, 5:30pm) | Debriefing Meeting, Council Library (#110) |
| 12 (Wednesday) | Council Action on recommendations |
| 18 (Tuesday, 8:30a) | HAND Technical Assistance, McCloskey Room (#135) |

2019 Jack Hopkins Social Services Funding Applications

Table of Contents

| | Agency | Request | Page |
|----------------------|---|---------------------|-------------|
| 1 | All Options PRC | \$ 10,000.00 | 1 |
| 2 | Amethyst House | \$ 18,055.00 | 15 |
| 3 | Be Loved Transportation | \$ 50,000.00 | 36 |
| 4 | Big Brothers Big Sisters | \$ 24,000.00 | 53 |
| 5 | Boys & Girls Clubs of Bloomington | \$ 18,717.00 | 67 |
| 6 | Catholic Charities | \$ 14,705.00 | 92 |
| 7 | Center for Sustainable Living (Indiana Solar for All) | \$ 31,290.00 | 103 |
| 8 | Community Kitchen of Monroe County | \$ 1,169.91 | 129 |
| 9 | Courage to Change Sober Living | \$ 6,000.00 | 148 |
| 10 | Girls, Inc | \$ 20,000.00 | 167 |
| 11 | Hoosier Hills Food Bank | \$ 5,000.00 | 188 |
| 12 | LIFEDesigns | \$ 20,000.00 | 203 |
| 13 | Made Up Mind | \$ 18,900.00 | 277 |
| 14 | Middle Way House | \$ 7,470.00 | 292 |
| 15 | Monroe County Humane Association | \$ 100,000.00 | 308 |
| 16 | Monroe County United Ministries | \$ 39,132.18 | 332 |
| 17 | Mother Hubbard's Cupboard | \$ 9,695.00 | 366 |
| 18 | My Sister's Closet | \$ 21,635.95 | 390 |
| 19 | New Hope for Families | \$ 21,384.80 | 424 |
| 20 | New Leaf - New Life | \$ 17,456.00 | 435 |
| 21 | Saint Vincent de Paul Society | \$ 10,000.00 | 446 |
| 22 | Shalom Community Center | \$ 12,502.00 | 464 |
| 23 | South Central Indiana Housing Opportunities | \$ 19,550.00 | 483 |
| 24 | Special Olympics Indiana Monroe County | \$ 11,563.16 | 496 |
| 25 | Volunteers in Medicine | \$ 24,800.00 | 515 |
| 26 | Wheeler Mission | \$ 18,226.48 | 526 |
| | Total | \$551,252.48 | |
| Collaborative | | | |
| | Area 10 Agency on Aging, Alzheimer's Resource, City's | | |
| 27 | Parks & Recreation and Commission on Aging | \$ 9,775.48 | 574 |
| 28 | Center for Sustainable Living and Made Up Mind | \$ 32,517.00 | 592 |
| 29 | Shalom Community Center and LIFEDesigns, Inc | \$ 8,497.50 | 642 |
| | South Central Indiana Housing Opportunities, CJAM, | | |
| 30 | Justice Unlocked and Tenant Assistant Project | \$ 15,352.00 | 662 |
| | Total | 66,141.98 | |
| | Grand Total | 617,394.46 | |

2019 Jack Hopkins Social Services Funding Applications

Index - Order by Request

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1. ALL- OPTIONSHoosier Diaper Program- \$10,000

City Residents Served: 864 (192 families) of (900 (200 families))

Employees:

| Full-Time | Part-Time | Volunteers |
|---------------|-----------|------------|
| 3 AOPRC | 0 | 25 |
| 8 All-Options | | |

Mission: 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 to have all options!

All-Options PRC is a secular, client-centered organization where everyone is welcome. We are proud to offer judgment-free support including free pregnancy tests, peer counseling, diapers, abortion funding, safer sex supplies, menstrual supplies, and referrals to community partners – all under one roof!

Our Hoosier Diaper Program strives to meet the overwhelming and 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 babies clean, dry and healthy, while also supporting families in increasing their economic stability and parenting with dignity.

Project Synopsis: All-Options requests \$10,000 to purchase 6 months of disposable diapers and wipes for our Hoosier Diaper Program. This grant would help us meet immediate demand while we continue to make the program more sustainable by seeking donations, sponsorships, grants, and in-kind diaper drives.

The Hoosier Diaper Program is a core part of All-Options Pregnancy Resource Center's services. We provide families who are struggling to make ends meet with diapers and wipes to keep their little ones clean, dry, and healthy. For families enrolled in our monthly program, we provide 3-5 packs of diapers per month (depending on number of children in diapers), as well as emergency assistance up to 3 times per year for families who are not monthly clients. In 2018, All-Options provided more than 3,350 packs of diapers (that's about 100,000 diapers!) and 2,414 packs of wipes to 200 low-income families (nearly 1,000 individual people) in the Bloomington area.

Our clients include single mothers who are struggling to provide the diapers required at their child's daycare; married couples who have cut back on groceries and other essentials to come up with the \$75 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.

Criteria:

Need – Access to clean diapers is critical to give infants and toddlers a strong foundation for healthy growth and development, yet the National Diaper Bank Network estimates that 1 in 3 Hoosier families are unable to provide enough diapers for their children. More than 50% of Hoosier families live on less than 200% of Federal Poverty Level (\$41,000/year for a family of three), and the SCAN 2012 found that the number of households that have trouble finding a job that pays enough to meet the family's basic needs has increased across all but the highest income levels.

Diapers are essential for raising kids, but no public assistance program helps families afford them. WIC and SNAP can't be used to pay for diapers; Temporary Assistance for Needy Families checks *can* be used for diapers, but at just \$288 per month for a family of three in Indiana, it falls far short. As a result, local families are regularly forced to make the impossible and heartbreaking choice between diapers, food, and other necessities - or try to stretch the diapers they can find. The Hoosier Diaper Program is a critical program addressing diaper need, which is desperate, overwhelming, and unacceptable.

One-Time Investment - We are requesting operational funding under the special allowance for 2019; our request does not meet the exceptions for pilot, bridge, or collaborative funding. All-Options did not receive funding from Jack Hopkins in 2018, and is working hard to sustain our Hoosier Diaper Program so it can meet the urgent needs of local families. We request funding for 2019 while we continue to identify additional income sources; specifically, this year we will be building a corporate sponsorship program, expanding our diaper drives, and applying for more grants in hopes of creating a more sustainable stream of funds for this program.

Fiscal Leveraging – While All-Options has grant funding for staff and core expenses, raising adequate money for the Hoosier Diaper Program has been a challenge. We have received generous support from community partners like Walmart and the Unitarian Universalist Church, but most grants and funding opportunities are one-time, while diaper need is relentless and ongoing.

A grant for operating costs would allow us to serve 100 Bloomington families in our monthly program for the rest of 2019. It would also leverage our Center Manager’s time toward building a stronger sponsorship program, community diaper drives, and continued fundraising from private foundations and individual donors.

Broad & Long-Lasting Effects – Children who don’t have access to adequate clean diapers suffer from increased diaper rash, infection, and illness. And without their own supply of disposable diapers, infants and toddlers are often not accepted into child care (including subsidized programs), which leads parents to miss work or school, exacerbating their economic challenges and undermining their ability to parent with dignity. In some situations, it can even lead to involvement with CPS when lack of diapers is seen as a sign of neglect. Providing adequate diapers makes a huge difference in the lives of struggling Bloomington families.

Although receiving a supplemental supply of diapers is what most often brings clients to All-Options for the first time, we also hear from families when they have needs and concerns around parenting, housing, health care, substance use/abuse, mental health needs, reproductive health needs, childcare, legal issues, and domestic and sexual violence. We make frequent referrals and connections to safety net providers in Monroe County and beyond, helping our clients meet basic needs. As a trusted resource and access point for services, All-Options and our Hoosier Diaper Program are vital parts of making Bloomington a healthy, thriving community for all of our residents.

Outcome Indicators:

- At least 20 families will come off the waiting list for the monthly Hoosier Diaper Program
- 100 Bloomington families (approximately 450 individual adults & children) will have an adequate monthly supply of diapers for at least 6 months
- 80-100 additional Bloomington families will receive emergency diaper assistance to help them bridge unusual circumstances such as job loss, housing loss, serious illness, or incarceration
- More families will receive an adequate supply of pull-ups for children in potty training; our clients report that All-Options is one of the only local agencies that regularly provides diapers in sizes 4 and up

Cost

Amount Requested (*in order of priority*)

| | |
|--|--------------------------|
| 1. \$1,650 equals a month’s supply of diapers for 100 families in our Hoosier Diaper Program. With a grant of \$5,000 we could serve at least 100 families for 3 months. | \$5,000 |
| 2. \$1,650 equals a month’s supply of diapers for 100 families in our Hoosier Diaper Program. With a grant of \$5,000 we could serve at least 100 families for 3 months. | \$5,000 |
| 3. We will purchase as many diapers and wipes as possible based on whatever funding we receive. | |
| TOTAL REQUESTED | \$10,000 |
| Total Project Cost | \$25,000 annually |

Past SSF Funding

| Year | Status | Title | Amount |
|------|----------|--|-------------|
| 2016 | Granted | To purchase disposable diapers and wipes for the All-Options Diaper Bank | \$8,400.00 |
| 2017 | Granted | To purchase diapers and wipes for the Hoosier Diaper Bank | \$12,000.00 |
| 2018 | Withdrew | Baby Boxes | \$4,500 |

Staff Comments

None

Upgrades to Men’s and Women’s Houses- \$18,055

City Residents Served: 450 (of 125)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 14 | 19 | 14 |

Mission: Our mission is to provide a foundation for sober living by partnering with individuals, families, and communities impacted by addictions and substance-abuse issues, offering quality recovery services and guidance for clean, sober and healthy living.

Project Synopsis: We are requesting \$9,077 to expand the case managers’ office at the women’s house into two offices. To best utilize our existing clinical space, we will be expanding the office to accommodate two case managers at a time, doubling our capacity for working with clients at the women’s house and providing better privacy for our residents when meeting with case managers.

We are also requesting \$5,932 to place vinyl plank flooring in the basement of our men’s house. This will be a great enhance and very aesthetically pleasing for our newly renovated therapeutic space for our residents and their families. It will provide a more durable floor to handle the foot traffic this space receives from residents, staff, outpatient clients, board members, and residents’ families. Last year’s Jack Hopkins grant allowed us to place this flooring in the upstairs living space at the house which was a great choice as it is durable makes the living room have a very homey feeling.

Lastly we are requesting \$3,046 for a new air conditioning unit for the men’s house which upon last inspection is pulling very high amp draw according to our service man, Russ owner of Resler Mechanical. Replacing this unit which is over 15 years old will help to bring our electrical costs down and the system will run more efficiently.

Criteria:

Need – Amethyst House is currently in its 38th year of operation, serving as many as 34 residential clients at any given time, both men and women (sometimes accompanied by their young children), who are recovering from the profound impact of drug and alcohol addiction. Indiana was home to 1,840 overdose deaths in 2017, an 18% increase from the previous year. This makes Indiana’s overdose death rate significantly higher than the national average. Our average stay for clients is 3-4 months, but we offer housing up to two years if clients need to stay longer. The at-risk population which we serve often experiences chronic homelessness and incarceration/institutionalization as a result of their addictions; Amethyst strives to help clients break this cycle with stable housing and aiding them in maintaining sobriety and building financial independence (in accordance with #7 "Meeting Essential Needs" in United Way's SCAN report).

The Jack Hopkins funding initiative has served Amethyst on numerous occasions, including major renovations, improvements, and new appliances. We hope that we will once again be considered by the Jack Hopkins Committee as we continue to upgrade our living facilities to meet new residential requirements and increase clinical and therapeutic space to better serve our clientele.

One-Time Investment - The expansion of the office at the women’s house is a one-time construction project.

The new floor at the men’s house basement will be a one-time installation. Vinyl plank flooring lasts 10-20 years on average but can last longer, so this should not need to be replaced for at least a decade.

The air conditioning unit will be a one-time installation that is estimated to last over 10 years.

Fiscal Leveraging – Financial:

1. We will use \$950.93 from our spring fundraiser with Beta Sigma Psi for this project.

Broad & Long-Lasting Effects – Over the past 37 years, Amethyst House has managed to sustain itself on a modest budget and with limited staff and resources. As one of just a handful of financially accessible treatment facilities accessible for those who do not have private health insurance to absorb the cost, Amethyst House is becoming increasingly unique in the state of Indiana.

However, in utilizing older buildings for our residential houses, Amethyst is often faced with repairs, upkeep, and improvements. And every year, given new grant funding opportunities, we look for ways in which we can request assistance for bettering our facilities. We remain proactive in renovations, repairs,

and any other improvements that will prevent larger-scale and/or long term damage to our houses; this helps minimize financial impact to our organization and allows us to continue to serve as a critical resource for those battling substance abuse as well as expand our capacity in order to serve a broader population. By expanding offices space, putting in a more durable floor, and replacing the air conditioner unit we will be ensuring that our facilities can better serve our community for longer.

Outcome Indicators:

- Increase capacity for individual counseling and case management sessions at the women’s house by 10%.
- Increase group and family sessions at residential settings by 30% in the next year. Currently most of our therapy sessions for residents take place at our outpatient office.
- Increase use of residential space for board meetings and 12 Step meetings by up to 20%.

Cost

Amount Requested *(in order of priority)*

| | |
|---|--------------------|
| 1. Women’s House Office Expansion | \$ 9,077 |
| 2. Men’s House Basement Floor | \$5,932 |
| 3. Men’s House Air Conditioning Unit | \$3,046 |
| 4. | |
| TOTAL REQUESTED | \$18,055.00 |
| Total Project Cost | \$19,005.93 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|--|-------------|
| 1995 | Denied | Start-up funds, office equipment and furnishings | \$20,000.00 |
| 1997 | Denied | Transitional Housing for men and women | \$8,557.00 |
| 1999 | Granted | New Van | \$10,000.00 |
| 2000 | Granted | Rebuild foundation of Womens' facilities | \$7,500.00 |
| 2001 | Denied | Phone, Voicemail, Computer networking | \$5,000.00 |
| 2002 | Granted | To help rebuild and expand the men's facility by restoring the historic façade. | \$20,000.00 |
| 2003 | Granted | To purchase and install a stairway elevator at Men’s House facility | \$4,521.00 |
| 2006 | Granted | To pay for property and liability insurance, utilities, food, and salaries needed to operate the Men's House at 215 North Rogers. | \$8,000.00 |
| 2010 | Granted | To replace vinyl and carpet flooring in, and purchase three dishwashers for, the Men’s and Women’s houses. | \$7,860.00 |
| 2011 | Granted | To purchase and install washers and dryers for men's and women's half-way houses. | \$4,000.00 |
| 2012 | Granted | Bathroom renovation | \$3,775.00 |
| 2013 | Granted | To renovate the roof at the men’s ¾-way facility at 416 West 4th Street and to renovate the chimney at the women’s residential facility at 322 W. 2nd Street. | \$9,090.00 |
| 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 to purchase new chairs for the Men's Halfway House | \$19,000.00 |
| 2016 | Granted | To pay for tree removal at both the Men's 3/4 Way House located at 416 W. 4th and at the Women's House at 322 W. 2nd and to pay for the replacement of the retaining wall at the Women's House at 322 W. 2nd. | \$13,500.00 |
| 2017 | Granted | To pay for the replacement of two refrigerators at the Men’s Halfway House, the repair and refinishing of wooden floors throughout the Men's 3/4 House and the Women's Halfway House, the repair of a retaining wall at the Women's Halfway House and the repainting of the concrete flooring in the Men's Halfway House | \$20,350.00 |
| 2018 | Granted | Expand and renovate therapeutic space at men’s house | \$16,758.00 |

Staff Comments

Ratio of City Residents/Total Clients Served by Program: 450/125.
Question: What are the correct numbers? If numbers are reversed, then about ¼ of clients served are city residents.

3. BE LOVED TRANSPORTATION, INC

Be Loved Wheelchair Program - \$50,000

City Residents Served: 25 (of 8)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 4 | 1 | 10 |

Mission: The *mission* of Be Loved Transportation, Inc, is to improve the quality of life among those in need and create opportunities for a career in the industry.

Project Synopsis:

ASK: Be Loved Transportation, Inc, is requesting \$50,000 for a wheelchair van with a lift to transport non-ambulatory clients to dialysis. These individuals are identified by the Davita Dialysis Center and Fresenius who see our client population 3 days a week and whom also attend necessary doctor appointments. Failure to meet their appointments compromises their health outcomes due to limited, late, inconsistent or nonexistent transportation due to the inability to transport the client with their wheelchair.

NEED: Due to the cancellation of Safe-Med Transportation who primarily transported wheelchair clients; traditional Medicaid recipients are left with limited or no transportation resulting in missed dialysis treatment and doctor's appointments and other necessary medical appointments compromising their health outcomes. Be Loved Transportation receives an average of 8-10 calls a day requesting transport for wheelchair bound individuals, meaning we are not able to meet the needs of the client(s) due to our inability to transport with the vehicles we have currently.

BENEFITS: The immediate benefits of acquiring a wheelchair van with lift capabilities will provide 5-8 clients daily the ability to meet their non-emergency health treatments; therefore reducing emergency medical attention. The impact that carries the greatest weight is the consistency of attending all treatments, which reduces the risk of compromised health and fatalities. Be Loved Transportation, Inc. will have a direct impact on five to eight clients daily, twenty five clients total.

Criteria:

Need – According to the Service Community Assessment of Needs reports that 'getting transportation for services was a major problem for 4% and a minor problem for 10%'. Transportation Monroe County offers accessible public transit within the city limits at low cost to residents and at no cost to IU students with a valid student identification card. However, transportation options are limited outside of Bloomington and providers indicate that this is a barrier to health access for some of their clients. In the 2010 household survey, 1% of households said this was a major problem, while 7% said it was a minor challenge.

Be Loved Transportation, Inc. has been providing non-emergency transportation since August 2016 filling the gap in transportation services for over 200 clients for appointments to; doctor visits, dental visits, mental health appointments, dialysis, chemotherapy and/or radiation, etc. The Be Loved Wheelchair Program will include picking up and dropping off an average of five to eight clients per day. Be Loved Transportation, Inc. will reduce the barriers identified clients who have the common complaint of inconsistent transportation by providing uninterrupted service Monday through Friday from 7:00 a.m. to 6:00 p.m. The program consists of five certified and qualified drivers who have been trained for this service by a veteran of over thirty years' experience of owning his own transportation service in Chicago, Illinois. Under his training and leadership hands on experience was learned in the approach of creating routes, time management, and client care. Volunteers will be recruited from the City of Bloomington Volunteer Network and will function in the capacity of answering phones, set schedules, distribute marketing brochures, flyers, escorting clients to and from vehicles. Volunteers will also be used in fundraising efforts.

One-Time Investment – Be Loved Transportation, Inc. is requesting a one-time investment of \$50,000 to purchase a wheelchair van with a lift. Once the purchase is complete the organization has the ability to support the operations to transport clients.

Fiscal Leveraging – Fiscal leveraging for the project and organization is accomplished through donor contributions, fundraising, grants and contracts; ie, Medicaid.

Broad & Long-Lasting Effects – The Long Term benefits are that 25 non-emergency medical clients or individuals will have uninterrupted transportation services to all treatment appointments. Be Loved will coordinate scheduling with treatment or medical facilities that will ensure five to eight people a day receive transportation services in a timely manner. The gap of provision for this vulnerable population will be narrowed with an expected outcome to be eliminated. Therefore, reducing the cost of emergency medical care, fatalities, and compromised care. In conclusion, families will be strengthened due to the access of care and renewed health outcomes.

Outcome Indicators: The outcome impact that carries the greatest weight is the consistency of making all treatments for dialysis, reducing the risk of compromised health and fatalities. Be Loved Transportation, Inc. will have a direct impact on five to eight clients daily, twenty five clients total. The indirect impact is that approximately 50 individuals will make up the family and communities in which they reside and the quality of life they experience by receiving consistent, affordable and easily accessible transportation. In addition, this reduces the stress and frustration of the care providers by aiding them in ensuring their loved ones or patients are receiving the necessary, timely care needed to ensure their quality of life and improved life outcomes.

Cost

Amount Requested (*in order of priority*)

| | |
|--|-----------------|
| 1. Wheelchair Van with Lift 2019 Toyota L Quote from Superior Van & Mobility | \$50,146.48 |
| 2. | |
| 3. | |
| 4. | |
| TOTAL REQUESTED | \$50,000 |
| Total Project Cost | \$55,000 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|--------|----------------|----------|
| 2018 | Denied | Conversion Van | \$20,000 |

Staff Comments

More on Need for Wheel-Chair Capable Transportation would be useful - The application indicates that Safe-Med Transportation provided wheel-chair bound Medicaid recipients to medical appointments, but has cancelled the service. BT Access will pick up clients within the City and Rural Transit will pick up clients in the County. Neither will take clients to Indianapolis (which, staff estimates, would occupy the vehicle for half-a-day). Knowing more about the gap in the provision of these services would be worthwhile.

Ratio of City Residents to Total Clients Served in 2019: 25 (of 8) – According to the Application, 25 non-emergency medical clients will have uninterrupted service to all treatment appointments. Question: Given the request for \$50,000 in City taxpayer-derived funds, it would be useful to know how many clients reside within the City and where are their typical destinations?

Site of Service: The application does not indicate where the vehicle(s) are housed or whether the property is zoned for this use.

One to One Mentoring: Bigs with Badges- \$24,000

City Residents Served: 15,000-20,000 (of 250-300)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 5 | 1 | 14 |

Mission: Our mission is to provide children facing adversity with strong and lasting, professionally supported one – to – one relationships that change their lives for the better, forever.

Project Synopsis: Big Brothers Big Sisters of South Central Indiana (BBBSSCI) seeks a one time investment of \$24,000 as funding for a new mentoring program, Bigs with Badges. Bigs with Badges is a program for at risk children who, through this program, will be paired with first responders in their local communities to foster better relationships. Bigs with Badges is solely an initiative of Big Brothers of South Central Indiana in accordance with many other branches of Big Brothers Big Sisters around America.

There is an identifiable problem between law enforcement and communities throughout the United States most noticeably in areas that are less fortunate. What Bigs with Badges aims to do is break down the barrier between children and police in these areas and decrease the idea that officers are only coming into these neighborhoods to arrest someone. The Service Community Assessment of Needs (SCAN) found that there was a need for more afterschool activities and programs for youth, especially school-aged youth. Youth are likely to engage in risk-taking behaviors like substance abuse, sexual conduct, and other behaviors considered delinquent in the hours directly after school.

We hope that through this approach (Bigs with Badges) not only will at risk children gain a positive role model in their community to look up to and strive to be like, but that this will also act as an initiative to further improve the relationship between our men and women in badges and the families in disadvantaged communities.

Criteria:

Need – The need for our services is clear as it is noted in the Service Community Assessment of Needs (SCAN) Monroe County that youth without supervision or productive activities following school hours are more likely to engage in unhealthy or undesirable behaviors. Afterschool activities can provide opportunities for mentoring, tutoring and academic support, positive social interaction, physical activity, and the chance to develop talents and interests.

In addition to this, 60% of low income families reported having varying degrees of trouble finding affordable after-school programs, with 40% reporting it as a major problem. 84% of non-low income individuals reported no problem in finding an affordable after-school program. These numbers reported from 2010 show an increasing trend since 2003, where only 20% of low income individuals reported affordable after-school programs as a major problem. Similarly, finding affordable recreational activities for teenagers is a much greater problem than in 2003 for all households.

In 2003, about 17% of all households said this was an issue. In 2003, about 30% of households with lower income found this to be a challenge, compared to 77% now.

Many youths are growing up alienated from relatives, neighbors, school, and the community which is often a result of poverty, single-parent families, and elevated levels of transience. According to the Bloomington Consolidated Plan (BCP) 2015-2019, page 108, part of the Anti-Poverty Strategy is “to provide access to information and emergency assistance to the most vulnerable elements of the community.” BBBSSCI can play a strategic role with the challenges that poverty and other disadvantages may bring about. The Bigs with Badges initiative will provide a direct answer to these problems facing the youth in Monroe County and will give way to a transcendent campaign of revolution throughout Indiana.

One-Time Investment - BBBSSCI seeks a one-time investment from the Jack Hopkins Social Service Funding to provide prevention and intervention for the participants of Bigs with Badges. This investment will provide funding for the pilot programs participants Bigs, who participate in pairings with local schools where they function as mentors based on shared interests, personality types, and goals for the relationship, with the children. Children in this program will work closely with Bigs with Badges in order to foster an improved relationship with officers in their community. The Big are required to eat lunch with their “Littles” once a week at the child’s school also the Big Brothers Big Sisters staff will host monthly meet-ups for games and activities. When matched by BBBSSCI, they may continue to participate in Bigs with Badges, but may meet more frequently in other settings.

Fiscal Leveraging – Seeking volunteers from Bloomington Police Department, Indiana University Police Department, Monroe County Sheriff’s Department, Bloomington Fire Department, Indiana State Police, and other first responders who wish to volunteer.

Due to the logistics of township Fire and the mobility of law enforcement, we feel that this project would require limited resources from the agencies while providing maximum outcomes for the community involved.

Broad & Long-Lasting Effects – While Monroe County is fortunate to have a wealth of productive opportunities for youth outside of school, not all youth have equal access to those opportunities. BBBS programming provides that access.

At any hour of the day, BBSSCI is working hard to provide all the children facing adversity in Monroe County with an opportunity to change their lives for the better. In 2016, we served 217 children with our One-to-One mentoring programs and over 100 children in our First Friends group program. BBSSCI is a mentoring program that pairs unrelated adult volunteers with children aged 5 to 18 years from single-parent households, free or reduced lunch, and children who have an incarcerated parent. Participants commit to meeting two or four times per month for 1 year. BBBS has an extensive infrastructure, including intense volunteer screening, match criteria, and ongoing supervision. BBSSCI takes great care in the matching process to ensure the best match possible, maximizing the impact on each of our *Little*s. While we ask matches to commit to 1 year in our program, our average match length is 29 months, a true testament to the compatibility of our matches.

During each pre-match meeting, a *Big* and *Little* set goals for a Youth Development Plan which covers behavior, academics, relationships, and self-confidence. The Youth Development Plan is designed to help *Little*s become college-ready and develop a growth mindset. Two *Little*s graduates from Indiana University in 2015 and 2016. From 2014 – 2016, 98% of the *Little*s who graduated from high school were accepted into college.

Outcome Indicators: We will measure our progress toward our goals by monitoring the number of matches through the information management system known as Matchforce. Not only does Matchforce store and help us track data, it also helps us manage day-to-day workload, providing queues (or work lists) that are aligned to our delivery of service. Because Matchforce is built on our Service Delivery Model, it is used in our work, from Customer Relations to Match Support, Core metrics and program scorecards, and support contact compliance and quality assurance.

Youth are given the YOS at the beginning of the match relationship and at the anniversary of their match. Youth and Mentors are given the SOR at the third month of their relationship and at the anniversary.

Program staff meets on a weekly basis to annualize some of the following short term and long term data: Match support done, average match length, and retention rate. Outcome Areas: Educational success (social acceptance scholastic competence Educational Expectations Grades) Risk behaviors avoided/reduced: Attitudes toward risky behaviors Socio-emotional competency: (social acceptance, parent trust, special adult relationships)

Program Director meets with the Executive Director monthly to report on the match safety, outcomes, and strength of relationship.

BBBS understands there cannot be positive outcomes unless all match relationships are safe. In 2016 BBSSCI completed 2,195 calls and in-person conversations to ensure the children in our program are safe and that our mentoring relationships are productive, healthy, and positive. In 2016 439 background checks were conducted on all volunteers.

We are committed to transparent accountability for our outcomes, holding ourselves accountable for each child in our program achieving results in three outcome areas: 1. Higher aspirations, greater confidence, and better relationships, 2. Avoidance of risky behaviors, and 3. Educational success.

Cost

Amount Requested (*in order of priority*)

| | |
|---|--|
| 1. <i>No Information Provided by Agency</i> | <i>No Information Provided by Agency</i> |
| 2. | |
| 3. | |
| 4. | |

| | |
|---------------------------|--------------------|
| TOTAL REQUESTED | \$24,000.00 |
| Total Project Cost | \$24,000.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|-----------|---------|---|-------------|
| 1995 | Granted | Office Renovation | \$4,800 |
| 1999 | Denied | Capital Grant | \$50,000 |
| 2000 | Denied | Long Range Business and Growth Plan | \$20,000 |
| 2000- Oct | 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 service 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. | \$8,109.00 |
| 2007 | Denied | Congregation Volunteer Recruitment Project | \$5,215.00 |
| 2008 | Denied | Bookend Bigs | \$7,905.00 |
| 2010 | Granted | To purchase BlackBaud Sphere in a Box website software and associated set up and training fee for use by agency. | \$2,900.00 |
| 2011 | Granted | To provide salaries, utilities, supplies and other operational costs for the One-to-One child mentor program. | \$7,000.00 |
| 2012 | Denied | Big Brothers Big Sisters relocation | \$10,000.00 |
| 2012 | Denied | Collaborative: PALS & Big Brothers Big Sisters Project LEAD (Linking Essential Assets for Development) | \$32,833.00 |
| 2013 | Granted | To finish the basement of the new facility at 807 North Walnut to better meet their needs. The renovation, in particular, will add a training/conference room, a dedicated intake office, a meeting room, and three separate cubicles for the match-support specialists and graduate interns. | \$25,600.00 |
| 2014 | Denied | One-to-One Youth Mentoring | \$25,000.00 |
| 2015 | Granted | To support a Match Support Specialist position in our One-to-One (OTO) Mentoring Program. | \$10,300.00 |
| | | | |

Staff Comments

Program Budget – A program budget was not included with the application. The application does not specify how grant funding will be spent. However, in citing of time-cards when seeking reimbursement the application suggests funds will be applied to staff salaries.

Operational Funds - Pilot Project – No Well-Developed Plan for Future Funding. Requests funding for new mentoring program to match at risk children with first responders. No well-developed plan for future funding accompanies this request for operational funds.

Other Comments Section – The application used the “Other Comments” section to elaborate on the experience, skills, and duties of staff and the history, recognition, and mission of the agency. And, for purposes of the Outcome Indicators, it provided the meaning of the following acronyms – Y.O.S. = Youth Outcome Surveys ; and, S.O.R. = Strength of Relationship.

Not Collaborative – Although the application indicates collaboration, the agency is not working directly with another non-profit organization, but rather targeting first responders to become “Bigs”.

City Residents Served: 600+ (of 450)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 23 | 103 | 503 |

Mission: 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. Our programs and services are designed to build character and strengthen life skills while providing hope and opportunity through accessible programming made possible by low membership dues (\$20/year), free transportation from school to club sites, and free programming offerings such as Cooking Club, Drama Club, Indiana’s Kids Tutoring, and Fencing to name a few. We are meeting the needs of our community by providing a well rounded afterschool opportunity that supports the goals of our city and the needs of its’ parents.

Project Synopsis: The Boys & Girls Clubs of Bloomington is requesting \$18,717.00 to cover costs for the site preparation for a new outdoor recreational space at the Ferguson Crestmont Club that will be utilized but its’ members and the community in the Crestmont neighborhood. This project includes putting foundational work (excavation and concrete work) down for a brand new playground to be enjoyed by BGCB members and community youth as well.

Site preparation includes removal of 7” of topsoil/fill where the playground will be constructed. The excavation depth allows for installation of a ‘safe-fall’ substrate. A short retaining wall, made from poured concrete, will be installed to account for sloping terrain. Additional safety site prep requirements will be completed as part of this project, to ensure that the new playground and recreation space can be installed.

Criteria:

Need – The 2012 **SCAN** study explains that the economic and social challenges faced by many of Monroe County’s youth limits their access to arts programs, education, and sports groups: “Access to appropriate health services and promoting healthy habits in youth and teens is critical to preventing chronic health conditions...almost half of children and teens age 6 to 17 are engaged in less than 5 days of vigorous activity in a week.” We are addressing Strategy 4 and 5 of the 2015-19 City of Bloomington Consolidated Plan: The BGCB is a community resource working to create a better quality of life for all citizens of Bloomington. According to the 2015-19 City of Bloomington Consolidated Plan, BGCB is addressing all items of Strategy 5, as we serve low income individuals/families, provide a safety net for community members in need, and provide valuable services to improve quality of life. Our program addresses “Anti Poverty Strategy #4” (91.215j) through “goals/policies that aim to reduce the number of poverty level families by providing resource to overcome poverty and by meeting a priority non-housing community need through youth services”. Furthermore, as listed in Strategy 4, BGCB will “continue to cooperate with other local funders on anti-poverty strategies, such as the United Way of Monroe County”.

One-Time Investment - This project is a one-time investment into the foundational development of a new playground space for our Ferguson Crestmont Club members and the neighborhood’s youth and families. We intend to build a long lasting and sustainable structure/area that will last for many years. We believe that solid foundational and site preparation work, along with a good site plan, will ensure the playground’s long-life.

Fiscal Leveraging – Currently, we are working with our local Patronicity coordinator to utilize their crowd-sourcing and matching funds program initiative to receive the CreatINg Places grant. Funds from this JHSS grant would be used toward the 1:1 matching fund program up to \$50,000. This would jump start the public campaign and encourage others to join with Jack Hopkins to fund the completion of the larger outdoor recreation and beautification plan. Jack Hopkins funds would also help us leverage other potential accessibility funding. The Bloomington Rotary Club members will be assisting with final site clean-up and a ribbon cutting ceremony when the playground is complete.

Broad & Long-Lasting Effects – Play is important to the social and physical development of youth, and safe play should be accessible to all of our youth. According to the American Council on Exercise, obesity in youth ages 6-19 has almost quadrupled since the late 1960s and youth that have access and programming to foster physical recreation are more likely to develop a healthier lifestyle. By spending extra time on the playground or participating in a sport, children reap the same benefits resulting in more focus at school and better outlook on relationships and school overall. Physical activity will prevent youth from becoming obese or help them lose weight, as well as teach them healthy habits that can last a lifetime. Playgrounds aren’t only for fun, but help youth and caregivers develop relationships in safe

environments. Additional benefits will be realized when neighborhood children and families begin to use the equipment, which will bring people to the Club site who otherwise may have not come to the Club. Developing a Community Center model continues to be a top priority for BGCB.

Outcome Indicators: To promote healthy lifestyles, the Ferguson Crestmont Club offers several programs that focus on nutrition and fitness: Cooking Club, Garden Club, Dance Club, cycling, sports, Triple Play, and tobacco and substance abuse prevention programs. While members participated in a great deal of healthy lifestyles programs last year, the new Ferguson Crestmont Club offers great opportunity for expansion including this outdoor space. According to the Annie E Casey Kids Count Database, in 2012 it was reported that 32% of Indiana youth ages 10-17 are obese - slightly above the national average. With this in mind, the Ferguson Crestmont Club will continue to promote creative healthy lifestyles for its members. Annually we collect qualitative data from members through the National Youth Outcome Initiative to gauge youth input. BGCB will track daily youth attendance and total number of youth served annually, and this number will serve as our base understanding of the minimum number of youth served as we will be unable to track usage by community members outside of BGCB program time.

Cost

Amount Requested (*in order of priority*)

| | |
|--|---------------------|
| 1. Site prep for new playground including excavation and a retaining wall. | \$18,717.00 |
| <i>[Able to Use Partial Funding? Yes]</i> | |
| | |
| | |
| TOTAL REQUESTED | \$18,717.00 |
| Total Project Cost | \$165,000.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|--|-------------|
| 1996 | Granted | Central Air Conditioning | \$3,000.00 |
| 1997 | Denied | Van | \$15,000.00 |
| 1998 | Granted | Renovate & equip facility for a teen center and learning center | \$23,000.00 |
| 2003 | Granted | Job Development Specialist for TEENS supreme Career Prep Program | \$25,000.00 |
| 2004 | Granted | Salaries, transportation, and other operating costs for No Kid Left Behind Program | \$8,000.00 |
| 2006 | Granted | Staffing, supplies, food, and rent for Crestmont Youth Camp | \$8,160.00 |
| 2007 | Denied | Pay for improvements to summer camp facility at Lake Lemon | \$9,370.00 |
| 2008 | Granted | Mini-bus to transport children | \$17,000.00 |
| 2009 | Granted | Salary/Benefits for Unit director at Crestmont site | \$14,257.00 |
| 2010 | Granted | Purchase bicycles and equipment for Club Riders Program | \$3,567.14 |
| 2011 | Granted | Salaries for Crestmont Boys & Girls Club Director | \$12,000.00 |
| 2012 | Denied | Teen Career Development Initiative | \$13,375.00 |
| 2013 | Granted | Finish basement of new facility at 807 N Walnut | \$25,778.00 |
| 2014 | Granted | Pay salaries and benefits for the Unit Director and Program Director; match payments for four Americorps volunteers | \$23,270.00 |
| 2015 | Granted | To replace the flat roof of a recently purchased building at 803 North Monroe Street, in the heart of the Crestmont Community. | \$25,000.00 |
| 2016 | Granted | To cover renovation costs of a two-story section of a Boys and Girls Club building located at 803 North Morton Street | \$19,000.00 |
| 2017 | Granted | To purchase chairs and tables for the New Crestmont Club | \$15,000.00 |
| 2018 | Granted | Furnishings for Lincoln Street Unit | \$27,000.00 |

Staff Comments

See Project Budget – for Complete Project Expenses

Other Comments Section – The application included text in this optional box that thanked the Council for past contributions, anticipated increased participation in 2019, foresees that these improvements will “broaden and expand the kind of programming [they] can offer in this location” and help beautify the neighborhood.

6. CATHOLIC CHARITIES OF BLOOMINGTON

Vulnerable Children Expansion Grant - \$14,705

City Residents Served: 198 (of 250)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 8 | 2 | 18 |

Mission: Catholic Charities Bloomington (CCB) Vulnerable Children Expansion Grant seeks to increase therapeutic services for children, particularly under the age of 8. This will be accomplished via the following:

1. Increase access and capacity of trauma-informed care for children and their families.
2. Provide high-quality trauma-informed services for those most vulnerable.
3. Increase capacity to intervene early with children who have experienced trauma and attachment wounds.

Project Synopsis: Catholic Charities Bloomington (CCB) is seeking a one-time investment of \$14,705 to expand agency capacity to treat children under the age of 8 with trauma and attachment wounds. Since our agency has developed a reputation for trauma treatment for the age span, we have seen an increase demand for services for children under the age of 8. Children present with disrupted attachment, emotional regulation issues, and behaviors that jeopardize their day care, preschool and after school placements. Schools are requesting assistance with treatment as it is jeopardizing the learning of not only the child, but other students around them. The Department of Social Services is referring families at risk to our agency. Over the past year, we have treated 179 children under the age of 8 in 1777 treatment sessions. We need to add another therapist with working knowledge of trauma treatment for children to provide early intervention and change the trajectory of their lives and of their families. Our demand for therapeutic skills for young children has increased almost 50%. The most difficult part of adding a new therapist is being able to support their first 6 months, as they are establishing client relationships, being added to insurance, and being trained for this special population. We are requesting a bridge grant to assist in adding a new specialized therapist to increase our capacity for early intervention and treatment of children and their families.

Criteria:

Need - The Community Survey in Bloomington’s Housing and Neighborhood Development’s 2015-2019 Consolidation Plan (p.54) ranked mental health and related services as the most critical need for our community. According to SCAN 2012 a significant number of households, particularly in the lower incomes, report that stress, anxiety and depression negatively impact their lives (p. 105). Additionally, the Client Challenges Survey in this report showed that a significant number of households cannot pay for counseling.

Violence and substance abuse have been strongly linked to trauma and lack of attachment. Studies show that two-thirds of those with substance use issues have experienced abuse, neglect, and/or related traumatic events. Without treatment for root causes, the cycle often continues when these victims become parents.

Since 2012 there has been an increase in Medicaid recipients; however, CCB has found limited mental health providers. In addition, there has been a significant increase in large deductibles in commercial insurance, making mental health services unaffordable to those families. CCB is the only agency in Bloomington providing therapeutic services to children under the age of 5 covered by Medicaid.

One-Time Investment - CCB has become known for treating trauma, especially children affected by the opioid addiction. The demand for services for children under 8 years has exploded and families are waiting an average of 6 to 8 weeks for treatment. To increase capacity, operational funding is requested to bridge the cost to hire another full-time therapist who can treat this age group. With the help of last year’s grant, we were able to expand staff from 5.5 to 7. To increase capacity again, operational funding is requested to hire a therapist to treat an additional 25 children a week, which cost will be able to be absorbed into the budget by November.

Fiscal Leveraging - We have trained 8 graduate students (volunteers) along with our current staff in Theraplay and Play Therapy through last year’s grants. We would like to hire one of those students graduating who has shown good efficacy in working with young children. EMDR training this summer will be obtained through a \$1,000 scholarship our agency earns for sponsoring the training locally. Archdiocese’s Department of Information Systems will supply a laptop. Our current budget can cover the 5 months of benefits at \$833 per month. If awarded the requested \$14,705, our CCB budget will be able to absorb the remaining costs ongoing.

Broad & Long-Lasting Effects –

1. Early intervention with young children prevents long-term emotional, social, and educational challenges by providing them with coping skills to be successful in those settings.
2. Interrupt the cycle of trauma in a family by treating both parents and children when needed.
3. Early intervention provides reinforcement of secure attachment with caregivers, giving children the foundation to create and maintain healthy relationships throughout their lifespan. Leading them to be successful contributing members in the community.
4. Increasing emotional regulation will increase school readiness and better academic success.

Outcome Indicators:

- A. There will be an increase in available appointments specializing in treatment for children under 8. We anticipate increasing 25 more sessions per week.
- B. Through monthly surveys the following outcomes will be measured:
 - (1) Caregivers will report that they feel more capable of parenting effectively.
 - (2) Families will report fewer emotional and behavioral problems at home and school.
 - (3) Children would be able to remain in school or child care longer, allowing families to maintain employment.

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| 1. First five months of therapist salary @2,941/month | \$14,705 |
| <hr/> | |
| TOTAL REQUESTED | \$14,705.00 |
| Total Project Cost | \$20,670.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|---|-------------|
| 2006 | Denied | Latino Outreach | \$4,800.00 |
| 2010 | Granted | To pay for start-up costs for the <i>Incredible Years Social Skills Training Program</i> described in the agency’s application. These include training two clinical staff, purchasing DVDs and supplemental materials (e.g. puppets, laminated cards, and books) for various curricula designed to reduce aggressive and disruptive behaviors. | \$8,894.25 |
| 2012 | Denied | Collaboration w/ S. Central Community Action Program - Prevention and early intervention mental health services for families living in poverty | \$22,846.73 |
| 2013 | Granted | To train up to three therapists in, and buying equipment for, a counseling model entitled <i>Theraplay</i> , with the goal of broadening its use. | \$4,775.00 |
| 2014 | Granted | To pay for Improving School Performance at Fairview through Mental Health Services program: salary and benefits for Project Coordinator and Clinical Nurse specialist, transportation costs for families, medical and data equipment. | \$12,625.71 |
| 2014 | Granted | Collaboration with Stepping Stones “to fund the following components of the Stepping Stones, Inc.-Catholic Charities of Bloomington Clinical Partnership initiative: the salary of the Clinical Partnership Program Director, staff trainings, counseling workbooks and program administration.” (Due to change in leadership, grant declined by other agency.) <i>Note: this project was not implemented and funds were returned.</i> | \$13,176.30 |
| 2015 | Denied | To fund it’s pilot program, Identifying the Mental Health Needs of Senior Citizens in Bloomington, which seeks to identify and support elderly individuals dealing with depression or other mental health problems in our community, paying particular attention to those living at or below the poverty level. | \$3,000.00 |
| 2017 | Granted | To purchase specialized supervision and training for play therapy, increase available weekly play therapy house, and purchase Positive Family Coaching to assist parents. | \$7,175.00 |
| 2018 | Granted | Trauma-Informed Care Project | \$13,000.00 |

Staff Comments

See Program Budget for itemized costs and leveraged funds.

Bridge-Funding – Costs to be absorbed into the Budget by November.

See Other Comments section for affirmation of the need for, and efficacy of, treatment for children under 8.

Year-End Financial Statement – *While a Revenue / Expenditure statement was provided, it was not accompanied by a Balance Sheet with all assets (including Land and Buildings - as was done last year).*

Indiana Solar for All- \$31,290

City Residents Served: 30 (of 31)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~20 |

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

ISFA 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.

After lengthy preparation, ISFA launched its pilot program in 2018.

Project Synopsis: Indiana Solar for All (ISFA) seeks a one-time investment of \$31,290 from JHSSF to purchase safety gear, specialized installation tools and a utility truck to carry everything needed to install a 3 kilowatt system.

The annual Solarize campaign sponsored by the City of Bloomington and SIREN is the major funding source for ISFA. Solarize installers collect a small per-watt surcharge on every contract and donate it to ISFA, which uses the money to purchase solar system components, installation supplies and consulting services. The amount collected one year pays for grants the next year. 2017 donations are paying for eight full grants in Round 1 (2018-19). 2018 donations will pay all costs for nine grants in Round 2 (2019-2020) while three households will be enabled to purchase a system at reduced cost.

In order to give the greatest number of solar grants, we minimize expenses by using volunteer labor from the community to supplement the work commitment of grantees. In addition, installation team members arrive at the job site bringing their own hand tools. So far we have also been controlling costs by borrowing the items we hope to buy with the aid of JHSSF funding.

Every installation requires 10 panels, various system components, 10' lengths of conduit and 14' lengths of racking, ladders, tables, tools and other gear. It would save a lot of time and trouble to be able to store and transport all this gear in a single vehicle which is under ISFA control. Additionally, we hope to replace borrowed safety harnesses, climbing ropes, hard hats and safety glasses. The program also needs to acquire a set of the tools that professional installers use.

Criteria:

Need – 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.” ISFA directly alleviates 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.

One-Time Investment - ISFA seeks a one-time investment from the JHSSF to purchase a covered van for transport and storage, specialized tools, and safety equipment for volunteers at every installation. The success of past installations has depended entirely upon volunteers' access to and willingness to provide the proper tools. With the turnover in installation crews every season, we can't always count on this. Furthermore, the lack of specialized tools causes unnecessary delays. Not having enough safety gear increases risks to volunteers and poses potential liabilities to our organization. JHSSF funding would improve our ability to provide consistent, reliable service.

Fiscal Leveraging – ISFA partners with the City. The annual Solarize campaign has supplied recurring funding for materials and services. Installation work is done by ISFA recipients and community volunteers, keeping the average cost per system to ~\$1.60 per watt vs. ~\$2.90/w for comparable purchased system.

As a CSL project, ISFA receives valuable resources such as banking, website hosting, IT and administrative support. SIREN, also a CSL project, provides engineering expertise as well as organizational and hands-on support. Ten community volunteers (some experienced in construction and project management) donated their time and skills to the 2018 installations. Two solar churches donated \$2,800.

Broad & Long-Lasting Effects – ISFA directly benefits low- to moderate-income households by reducing their utility bills and increasing the value of their homes, thus improving their economic stability. It also provides training in skills that may help prepare people (especially the teenagers in ISFA families) for good-paying jobs. The renewable energy sector is creating jobs at a rate many times faster than the general economy.

ISFA’s mission will become increasingly important as our community prepares for climate change. ISFA grantees report feeling empowered and grateful to be able to make a contribution by reducing their carbon footprint and adding clean energy sources to the grid. Even more than the average Solarize customer, they become advocates for solar because they invested themselves in it body and soul. Being part of a crew that can install a solar system in a day or two demystifies the transition to renewables. This attitude change is needed to mobilize a wide-spread response to the major challenge of our times.

Outcome Indicators: ISFA collects data on monthly energy production from each solar array, alongside recipients’ monthly utility bill, to estimate the amount of defrayed costs per household. These data provide an easy, quantifiable way to assess the impact of the program over time.

We have already seen measurable impacts since the four installations in October/November 2018. In the following three months (the least productive of the year), utility costs were reduced approximately 16%, on average, per household. We also noticed a reduction in overall energy consumption per household compared to the previous year, suggesting a change in behavior among the families served.

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| 1. Safety equipment (10 hard hats, rooftop rope and anchor system with 5 each of: body harnesses, reusable rooftop anchor brackets, 30-ft self-retracting lifelines, 6 ft shock absorbing lanyards, and locking carabiners to satisfy OSHA safety requirements) | \$3,270 |
| 2. Used 14-ft Freightliner MT45 Utility Step Van or similar | \$25,000 |
| 3. Specialized tools (including 2 portable impact drills, 2 portable drills, 2 torque wrenches, portable band saw, flat pry bars, conduit bender, professional electrical tools) | \$2,105 |
| 4. Fiberglass Ladders (6 ft step ladder, 20 ft extension ladder) | \$290 |
| 5. 15 ft Non-Rolling Scaffolding tower | \$625 |
| TOTAL REQUESTED | \$31,290 |
| Total Project Cost | \$92,162.88 |

Past SSF Funding

Center for Sustainable Living

| Year | Status | Title | Amount |
|------|---------|---|------------|
| 2005 | Denied | Human Power: Service Learning on Wheels | \$3,060.00 |
| 2018 | Granted | Expand Glenn Carter Memorial Toolshare Workshop | \$3,000.00 |

Staff Comments

No comments.

Equipment purchase and van retrofitting- \$1,169.91

City Residents Served: 2,589 (of 3,450)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|-------------|
| 6 | 12 | Over 120/wk |

Mission: 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 are requesting \$1,169.91 to purchase a new commercial vacuum cleaner and to purchase awnings with which to retrofit two of our vans for better summer food service delivery. We deliver sack lunches to children in ten low-income neighborhoods each summer when school is out. The awnings will allow us to provide a small amount of shelter from sun or rain while children eat. In addition, we need another functional vacuum cleaner. Purchasing a commercial unit may help us avoid having to replace the vacuum every other year.

Criteria:

Need – Community Kitchen addresses Strategy #5 (Public Service Assistance) of the City’s Consolidated Plan 2015-19. Strategy #5 states “Provide funding to non-profit organizations that serve low income individuals/families with their basic emergency needs: food, shelter and health care.” (p. 6 & 91). Within the section NA-40 Homeless Needs Assessment, funding for service providers (like Community Kitchen) is listed as the second of five priorities for the next five years (p. 50).

According to Section 504 Needs Assessment, Community Kitchen was among the top four most highly utilized Community Resources or Programs (Consolidated Plan, p.44). In addition, 53% of those Housing Choice voucher and public housing tenants responding indicated that food was the largest strain on their budget (p. 44). Not only is Community Kitchen a vital agency functioning in accordance with the City’s Consolidated Plan, but we also fit into the City of Bloomington’s Anti-Poverty Strategy (Consolidated Plan p.108). According to items 2 and 4, part of the plan is to 2. “provide access to emergency assistance by providing funding...to agencies that provide said services” and 4. C. “continue to cooperate with other local funders on anti-poverty strategies”.

One-Time Investment - Community Kitchen is seeking funding for a one-time investment in equipment of a commercial vacuum cleaner and awnings with which to retrofit two of our vans for Summer Food Service delivery for children.

Fiscal Leveraging – While the vacuum won’t leverage funds, we hope it eliminates the cost of purchasing replacement units as often.

The state’s Summer Food Service Program will only reimburse us for lunches consumed by children in a congregate setting. A good number of children won’t stay at the serving site to eat when the sun is especially hot or it’s raining. When they don’t stay, we aren’t able to claim those meals and receive funding. By providing this relief from the weather, we will potentially increase the number of meals served according to the requirements to gain reimbursement, thereby leveraging additional funding.

Broad & Long-Lasting Effects – We are hopeful that the addition of awnings to the delivery vans used for our Summer Food Service Program will help us feed more children and claim the funding that allows us further investment in the nutrition of the program. We know that access to food and nutrition are commonly accepted necessities for healthy individuals. Proper nutrition helps ensure success in school and age appropriate development, along with better physical and mental health. As the need for Kitchen services continues and we continue to reach more and more children through our programs, the benefits to the community are long lasting and take the form of more healthy children, better learners, lower dropout rates, lower incarceration rates and more productive citizens.

Outcome Indicators: The outcome indicator for the success of this project will be our reimbursement percentage for meals served through our Summer Food Service Program. Having no shelter from rain or sun in the past, we were only able to claim 75% of the meals we served through the program in the summer of 2018. An improvement in the percentage of the meals we are able to claim for reimbursement will be a measure of the success of this project.

CostAmount Requested (*in order of priority*)

| | |
|----------------------------------|------------------|
| 1. Awnings (2) @ \$289.75 | \$579.50 |
| 2. Hoover Commercial Vacuum | \$459.79 |
| 3. Awning Brackets (6) @ \$21.77 | \$130.62 |
| | |
| TOTAL REQUESTED | \$1169.91 |
| Total Project Cost | \$1169.91 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|--|-------------|
| 1995 | Granted | Used vehicle to serve meals | \$9,000.00 |
| 1997 | Granted | Transport containers to provide meals to at risk youth in after school programs | \$1,300.00 |
| 1998 | Granted | Purchase upright commercial oven, mobile sheet pan rack, and mats for kitchen floor | \$4,675.00 |
| 1999 | Granted | Ice machine and freezer | \$4,650.00 |
| 2000 | Granted | Eight dining tables | \$2,460.00 |
| 2001 | Granted | To purchase equipment for second food preparation and distribution site | \$10,721.00 |
| 2002 | Granted | To purchase a copy machine shared with Shelter, Inc. and aprons, and hairnets | \$3,639.00 |
| 2003 | Granted | Replace fire suppression system, loading dock, and 60 chairs for the S. Rogers site | \$10,104.00 |
| 2004 | Granted | Replacing a door and dishwashing machine, purchase a garbage disposal and kitchen grade metal shelving | \$7,780.00 |
| 2005 | Granted | Replace produce cooler and purchase food trays for free meal service | \$4,100.00 |
| 2006 | Granted | To purchase and repair a used van from Girls, Inc. | \$8,401.00 |
| 2007 | Granted | To purchase and install a walk-in cooler and freezer for the 917 South Rogers facility. | \$29,800.00 |
| 2008 | Granted | To purchase a commercial-grade refrigerator for use at 917 South Rogers Street. | \$2,350.00 |
| 2009 | Granted | To purchase printed backpacks for the Backpack Buddies program. | \$1,005.00 |
| 2010 | Granted | To purchase a pallet truck, ice machine and storage bin and two "trainable" dollies for use at their current and future sites on South Rogers Street. | \$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. These items are set forth in the application and include a professional food processor, a commercial can opener, pots, food containers with lids, knife racks and a cutting board, and various serving utensils. | \$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 | \$8,830.00 |

Staff Comments

Leveraging funds - According to the application, purchase of van awnings will increase state Summer Food Service Program reimbursements by meeting the state's requirement for children to congregate.

See Other Comments for agency statistics and mission.

9. COURAGE TO CHANGE SOBER LIVING

Fresh Start Rent Subsidy Program- \$6,000

City Residents Served: 36-40 (of 36-40)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| | 2 | <15 |

Mission: Courage to Change Sober Living provides low barrier, affordable, safe sober living, transitional housing to people affected by substance abuse disorders. Courage to Change Sober Living was founded in 2015 when a need for more transitional housing options was identified by members of the community. At that time there was a rise in opioid addiction throughout the state of Indiana making it even more important to have a broader range of housing options for those facing substance abuse disorders.

Courage to Change started with one house and has grown to four houses--two women's houses and two men's houses-allowing us to serve 18 clients at a time. Since its' inception Courage to Change has served over 75 clients with 95% of those clients being from Monroe County.

Courage to Change Sober Living applicants come from self-referral, family members, Monroe County Probation Office, Monroe County Prosecutors Office, Monroe County Correctional Facility, Indiana Department of Corrections and other substance abuse treatment facilities.

Courage to Change was founded on the belief that individuals need a safe, sober, low barrier, supportive environment in order for them to take responsibility for their recovery. We also believe these housing options should be available for all income levels.

Project Synopsis: Courage to Change Sober Living is asking \$6000.00 to expand our Fresh Start Rent Subsidy program. Rent includes utilities.

Our residents face many obstacles including the financial burden of paying rent, court fees, and probation fees while transitioning out of homelessness, unemployment, incarceration or other crisis situations. CTC recognizes that substance abuse exacerbates homelessness for both individuals and families. We also recognize that homelessness can be a catalyst for substance abuse as individuals may begin using or using more heavily as a means to cope.

The Fresh Start Fund provides assistance to our residents as a one time request during their stay under the following circumstances:

1. new CTC resident.
2. resident has relapsed and after treatment the resident will return to CTC.
3. resident has lost their job and is seeking new employment.
4. drug court temporary mandated incarceration with the resident returning to a CTC house.
5. Residents must apply for the Fresh Start Fund and must meet all other requirements of our program in order to be given this one time assistance.

This program allows new residents the opportunity to secure employment and become self-sufficient in the household; allows residents who have relapsed, lost their job or who had to satisfy court mandated temporary incarceration to do so without the extra burden of becoming homeless. Courage to Change Sober Living strives to provide a holistic approach to recovery by addressing an individuals' physical needs such as food and shelter alongside the addiction.

Criteria:

Need –According to SCAN 2012 , key findings from the major social service agencies report major issues for their clients include paying the rent, finding a good job, paying for legal issues, paying for clothing and utilities and dealing with stress, anxiety and depression. SCAN also reports that persons suffering from addiction often have a low level of job skills and low level of education. SCAN continues to find that the essentials for our population are the basic needs including sufficient food, a stable place to live, health care and wellness and crisis management skills. Barriers like unemployment, low wages, exposure to violence and substance abuse prevent individuals from meeting these basic needs.

In the HAND 2015-2019 report the need for affordable housing exceeds the availability for all persons. The executive summary outlines strategies including strategy number 5 under Public Service Assistance: provide funding to nonprofit organizations that serve low income individuals/families with their basic needs of food, shelter and health care; provide funding to nonprofit organizations that provide a safety net for community members in need; provide funding to nonprofit organizations that provide valuable services to improve quality of life.

Courage to Change and the Fresh Start Fund acts as a bridge to those coming out of the criminal justice system in particular who leave without funds or means to pay rent, have barriers to finding employment and who are in need of safe, sober, transitional housing until they can become more stable in their recovery, find employment and feel ready to secure housing on their own.

Recidivism is a huge problem in our community and lack of housing along with addiction and lack of employment is directly related to our recidivism rates. Our residents have a difficult time finding landlords who will rent to them especially coming directly from prison or jail. By living in one of our

houses, residents start to build up a history of paying rent, having a job, being in a stable environment and making community connections.

The Fresh Start Rent Fund helps our residents enter into our program and stay in our program by paying their rent for one month. While helping with a month's rent may not seem like much it can mean the difference between becoming homeless, maintaining a job, staying in compliance with the court system and maintaining sobriety.

One-Time Investment - We are requesting operational funding for our Fresh Start Rent Subsidy fund because our ability to pay rent drives our ability to provide our services. Courage to Change Sober Living rents houses in our community in order to provide low barrier, safe and sober transitional housing to residents of Monroe County. We currently run four houses—two men's house and two women's houses. Simply put, if we can't pay our rent we can't provide our services.

Courage to Change is a good tenant and serves as an example of sober living houses that exist in neighborhoods throughout the city of Bloomington, are good neighbors and can hopefully serve to remove some of the stigma many people have surrounding sober living houses. It isn't always easy to get landlords to rent to us because of this stigma. Slowly but slowly that is changing because of our track record of being good tenants.

The Fresh Start program is an acknowledgement that there are times when our residents encounter obstacles to paying their rent each month. CTC strives to keep our residents in our houses so they can remain living in a safe and sober environment with guidance and support from staff and their peers. Courage to Change understands the stakes are high for our residents if they do experience homelessness or have to live in an unsafe living environment. Homelessness can trigger substance abuse which can then begin the cycle of incarceration again.

The Fresh Start Program gives our residents some breathing room—either immediately upon being released from jail or prison when they have no resources to call upon or when a crisis situation happens and they are unable to pay that month's rent. Our residents understand we will work with them to get back on track by providing them with rent assistance so they can concentrate on finding employment, taking care of probation demands, getting back in compliance with drug court without worrying on where they are going to live.

Future funding will consist of support from Sober Joe Coffee, grants, donations from individuals, fundraising and the township trustees have given money to our residents in the past for a month's rent on an irregular basis but we are in the process of speaking with the Bloomington Township Trustees as well as Perry Township in order to see if this can be on a more regular basis.

Fiscal Leveraging - Courage to Change leverages other sources of funding in order to ensure sustainability including individual donations and funding from Sober Joe Coffee. Courage to Change is a young nonprofit and as such is seeking a more diversified approach to fundraising including donations, township trustees, grants and partnerships with local landlords.

Sober Joe Coffee is a local business that partnered with Courage to Change in starting the Fresh Start rent subsidy program a year ago after seeing the need for subsidies for those unable to afford the first month rent thus making them ineligible for acceptance into the program.

With this grant we are hoping to expand our Fresh Start program which will make it possible for us to offer this rent subsidy to more of our residents throughout the year not only for new residents but also for those who are unable to pay their rent at one point during their stay for the reasons outlined in this grant application.

Broad & Long-Lasting Effects - Having a stable home will provide some of the first steps in breaking down barriers that individuals who experience substance abuse disorders face. Once individuals have access to stable housing in a safe and sober environment Courage to Change will also work with other community organizations to help further sustain sober living.

By providing a safe and sober living environment for individuals Courage to Change Sober Living is also impacting the community as a whole in many ways including allowing our residents to concentrate on their recovery without worrying about becoming homeless, allowing them to reconnect with their family, better employment rates, better health and a feeling of connection to the community. This helps to alleviate the financial cost of the cycle of addiction, homelessness and recidivism. The community benefits as well when everyone feels connected and are part of contributing to the community.

95% of the clients Courage to Change serves are from Monroe County. Since 2015 we have served over 75 clients. Starting with one house we have grown to 4 houses—two women's and two men's which allows us to serve 18 clients at a time. Residents sign an agreement to stay in a house for a minimum of three months with an average stay of six. We serve 18 clients at a time but over the year we serve more than 18 clients depending on how quickly our clients feel ready to transition to living on their own.

The Fresh Start rent subsidy program allows us to give more residents the ability to enter our program as first time residents or stay in our program if circumstances lead them to not being able to pay that month's rent. Most if not all of our residents come to us without anything—no money, no family ties, no job. This program gives them the help they need until they become more stable in their recovery and in their employment situation.

Outcome Indicators: This funding request will be used to expand our Fresh Start Rent Subsidy Fund so that we are able to provide more of our residents with rent help during their stay.

Short term indicators include how many new residents will be able to enter our program with their rent paid for the first month; how many residents who have to leave our houses due to relapse or temporary incarceration will be able to take advantage of this fund and won't have to worry about rent while they deal with the issue that caused them to leave our houses temporarily and residents who have lost their job but are seeking new employment without worrying about becoming homeless.

We will be able to measure how many of our residents who received money from the Fresh Start Fund got their lives back on track, remained living in our houses beyond the month of help, dealt with whatever crisis may have caused them to not be able to pay rent and how this Fresh Start Fund helped them to stay focused on their recovery instead of worrying about seeking a new place to live.

Our house managers hold weekly house meetings with our residents and ask the types of questions that will allow CTC to measure how much of an impact the Fresh Start Rent Subsidy Fund has had on an individual.

Cost

Amount Requested (*in order of priority*)

| | |
|--------------------------------------|-------------------|
| 1. One month rent paid for residents | \$500.00 |
| 2. Two weeks rent paid for residents | \$250.00 |
| 3. One week rent paid for residents | \$125.00 |
| | |
| TOTAL REQUESTED | \$6,000.00 |
| Total Project Cost | \$9,000.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|--------|-------|--------|
| N/A | | | |

Staff Comments

New Applicant – 501(c)(3) Notice [dated December 8, 2016] – Provided

Request – Partial Funding – Start of Funding - The request is for a month's rent and utilities (\$500 – or \$125/week) for two residents for six months. *Question: Is the applicant asking for reimbursement for services provided before the approval of funding (~ 6/12/19)? If so, the Committee be aware of the request and make that part of any approval.*

Operational Funds - Well-Developed Plan for Future Funding – *The application notes that future funding will come from “Sober Joe’s Coffee, grants, donations from individuals, fundraising and the township trustees...”*

Financial Statements – [unaudited] – *The Application includes an Operating Budget for 2018-19 with expenses of \$102,590 and income of \$105,652. The top three expenses are: housing (\$76,500); salaries (\$20,800 – @ \$10/hour); and Administration (\$3,690). The top three sources of revenue are: Rental Income (\$80,000); Restricted Grants (\$15,852); and Donations/Fundraising (\$5,000). Question: What time period does this budget cover?*

City Residents Served – *As a City taxpayer-based fund program, the JHSSF Committee attempts to ascertain the percentage of clients who are city residents. While difficult at times to measure, the Committee may want to know more about where these clients were prior to these sober homes. The **Other Comments** section indicates that “most [residents] come to us from the criminal justice system and arrive without money, clothes, transportation or family connections.”*

Project Sites – Unstated – Compliance with regulations? *This is a new applicant which requests funds for rental assistance at four unstated locations. The application form requests addresses and whether the activity is done in compliance with local regulations. The application indicated that the project will be housed at four addresses and did not provide those addresses. The Committee may want assurances the City funds are going toward uses that comply with local code.*

Application – Text Box Word Limits – *This application exceeded the word limit for almost every text box and sometimes by about twice the limit.*

Safety and Security- \$20,000

City Residents Served: 500+ (of 600+)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 4 | 7 | 109 |

Mission: Girls Inc. of Monroe County inspires all girls to be strong, smart, and bold. We believe that the Girls Inc. experience equips girls to navigate gender, economic, and social barriers and to grow into healthy, educated, and independent adults. Our organization specifically focuses on girls ages 5-18 that live within Monroe County by tailoring our offered programs to their needs.

Girls Inc. of Monroe County's vision is to commit our services through a unique girls-only environment; creating an inclusive environment consisting of adult mentors, career women, and girls. At Girls Inc., we promote learning services that aim to overcome gender discrimination, social inequity, and other barriers to success. Our programming provides opportunities for girls to build skills and capabilities to become responsible, confident, and self-sufficient adults. Our diverse programming focuses on finance and STEM educational activities, healthy living and nutrition, physical activity and team building, healthy relationships and self-confidence. At Girls Inc., we support girls from all socioeconomic and ethnic backgrounds, with a targeted focus on girls who come from low-income or split-family situations.

Project Synopsis: We are requesting \$20,000 to install a comprehensive security system at the Girls Inc. of Monroe County center. Our goal is to create a safer and more secure environment for our girls, volunteers, and staff. The security system will enable Girls Inc. to guarantee that all girls who participate in our programs will be in an environment dedicated to their safety as much as to their development and education. This security system will encompass the entire Girls Inc. campus (both the gymnasium and the learning center), and will be equipped with remote access control. The access control will be a significant improvement to our existing security system, as it will allow Girls Inc. employees to be aware of anyone attempting to gain entrance to the facility through the use of a doorbell system. Additionally, access can be remotely turned off in the case that a card or key fob is lost. Finally, this system will enable Girls Inc. to establish a closer and more accessible relationship with the local police and fire departments.

Criteria:

Need – This project will enable Girls Inc. to provide a safe and secure learning center. Providing a secure area will improve the trust of our girls’ families to ensure the well-being of the girls while they are engaging with our programs. Whether they are learning computer skills in our computer lab, learning to cook in our kitchen, or playing volleyball in the gym, Girls Inc. strives to provide the resources Monroe County girls need to succeed and thrive in our community. Installing a comprehensive security system will create an even safer environment for our inclusive space and will facilitate better learning outcomes for girls of all income levels and ages.

One-Time Investment - The purchase of a security system with access control is a one-time investment requiring few maintenance and operations costs. Installation costs of equipment purchases, labor, and technology installations are all one-time purchases. There are monthly costs associated with the system; however, Girls Inc. will use our operational funds to cover those ongoing costs.

Fiscal Leveraging – The purchase of the security system is a one-time investment and will not require additional funds, contributions, or volunteer hours.

Broad & Long-Lasting Effects – Investing in a comprehensive security system with access control will provide a safer environment in which for Girls Inc. girls to learn. This promotes greater trust between our participants and their guardians; allowing the girls to grow in an inclusive space. Research supports the assertion that safer environments facilitate better learning outcomes. Girls Inc. girls will be more involved in our programs, will be better learners in school, and will be more prepared for life after school because of the knowledge, social skills, and self-confidence gained by participating in our programs.

Additionally, employees and staff will be less stressed over safety concerns while youth are in the buildings. Additional security provisions will also reduce liability for Girls Inc. in the case of a safety incident. Finally, Girls Inc. will be better connected to security services like the police and fire departments in cases of emergency.

Outcome Indicators:

All girls who participate in our programs (approximately 600) will have improved access to a safer environment in which to thrive, grow, and learn in.

All 120 Girls Inc. staff and volunteers will have improved access to a secure environment, ensuring that they feel safer and more secure while working.

Volunteers will feel less stressed while monitoring for safety and security while working with girls in both the gymnasium and learning center.

Girls Inc. will have improved access to police and fire services and will experience less liability in the case of emergencies.

Cost

Amount Requested (*in order of priority*)

| | |
|---|-----------------|
| <i>Note: Application indicates that Applicant will <u>not</u> be able to proceed with less than full funding.</i> | \$20,000 |
| TOTAL REQUESTED | \$20,000 |
| Total Project Cost | \$20,000 |

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 |
| 2000- June | Granted | For supplies and equipment for summer camp program and two car infant seats | \$2,303.00 |
| 2000-Oct | Granted | For the Friendly PEERsuasion Program | \$2,500.00 |
| 2000-Oct | Granted | For books, refreshments, and misc. equipment for after school reading program | \$620.00 |
| 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 |
| 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, one year's annual management and support agreement, a scanner and in-house staff training, | \$5,110.00 |
| 2014 | Denied | Addition of Sports Program Manager | \$19,747.80 |
| 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 |
| 2018 | Granted | Repair Bus Fleet | \$13,463.00 |

Staff Comments

Full Funding Requested – *The application indicates that the project will not go forward without full funding from JHSSF. Two estimates were received in 2017. One proposed ~ \$20,116. New estimates will be sought. Question: If funded, how will the agency pay for a higher estimate?*

Financial Statements – *Expense/Revenue Statement Provided – No Asset Balance Sheet (This agency owns land and buildings).*

Truck Replacement- \$5,000

City Residents Served: 10,062 (of 25,800)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 11 | 2 | 1,968 |

Mission: HHFB collects donated and other food, stores and distributes it through direct service programs and to partner agencies serving people with low incomes, children, seniors and the ill in south central Indiana.

Project Synopsis: We are requesting \$5,000 in challenge matching funds that will serve as the down payment on the purchase of a new, high payload refrigerated box truck with a lift-gate. The new vehicle will replace a 31-year old truck that will be retired.

This truck will have a variety of uses including pick up of large fresh produce loads from Gleaners Mixing Center in Indianapolis and from local farms that are gleaning partners. It will also collect food from retailers in Bloomington and make deliveries to Mother Hubbard’s Cupboard; and will serve to back up our other high capacity box truck when it is unavailable and be used during large food drives like Hoosier Hysteria, Stamp Out Hunger and IU Health and special events including the community book fair.

We raised \$85,000 toward the \$140,000 cost of a new truck including a \$65,000 anonymous challenge payable if we raise the remaining \$55,000 before December 1. Since announcing the challenge on March 22 we’ve raised an additional \$8,300 and are seeking funders for the balance.

Criteria:

Need – The last SCAN report states that “having access to an adequate food supply continues to be a problem for some individuals and families (and) hunger can be associated with homelessness, poverty and unemployment,” while the Consolidated Plan emphasizes support for providing assistance to non-profits addressing basic needs such as food, shelter and health care through Jack Hopkins and CDBG funding. At least 20 of the agencies noted in the plan as contributing to these goals and being used by clients for support services are partner agencies of HHFB. Additionally, Monroe County has a food insecurity rate of 17.6% and child food insecurity rate of 18.6% meaning over 25,000 individuals including over 4,200 children are food insecure in our area (www.feedingamerica.org/mapthegap). We believe our work is grounded in two principles that are highly accepted among City of Bloomington residents – compassion, that dictates no one be allowed to go hungry in our community; and sustainability – which requires that food not be wasted but rather channeled to those who need it.

One-Time Investment – Our request is for partial funding of the one-time purchase of a piece of equipment – a new, high payload, refrigerated box truck with lift-gate. While there are ongoing expenses involved in maintenance of a vehicle (insurance, registration, etc.), some of those costs will covered through retirement of an existing vehicle and savings in repair and maintenance costs. While the current truck required over \$7300 in repairs this year simply to pass annual DOT inspection, the new truck will be under warranty.

Fiscal Leveraging – Our request is for a contribution of \$5,000 from the City of Bloomington toward the \$55,000 needed to meet a challenge grant that will provide \$65,000 in funding toward a total cost of \$140,000, so leveraging other funds is precisely the reason for our request. Once put in service, the vehicle itself will be used to collect donated food both locally and through the Gleaners Produce Mixing center in Indianapolis and distribute such food to partner agencies. Local collection will include retail/wholesale donor sources and produce gleaned from local farm donors. Currently, the lack of a reliable high capacity truck requires that we forgo opportunities to obtain certain donations. In 2018, HHFB leveraged food valued at over \$2.9 million for distribution in the City of Bloomington.

Broad & Long-Lasting Effects – We anticipate that there will always be some level of need for the services provided by Hoosier Hills Food Bank. There will always be food in danger of being wasted and there will always be people who are in need of food assistance. We believe that maintaining a strong community food bank is essential to ensuring that however food insecurity levels may fluctuate, hunger will never be an issue for people in our community. There should always be a strong mechanism in place to ensure that it isn’t. The vehicle we are purchasing should serve our organization for at least 15 years or more. We intend to remain a strong voice and a strong actor in ensuring that people do not go hungry and that they have the nutrition necessary to learn, work, play, grow and be health citizens.

Outcome Indicators: Ultimately, we hope our work will result in lower food insecurity rates and there has been some very small progress in this direction, but we would be reluctant to tie this specific grant request to such a measure. We do believe, however, that acquisition in the levels of fresh produce we obtain and distribute and reductions in vehicle repair costs and staff time associated with the effects of unreliable or unavailable vehicles.

Cost

Amount Requested (*in order of priority*)

| | |
|---|---------------------|
| 1. While a lower award will require additional fundraising elsewhere, any amount will count toward our challenge. | |
| TOTAL REQUESTED | \$5,000.00 |
| Total Project Cost | \$140,000.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|---|-------------|
| 1994 | Denied | Warehouse addition, freezer, cooler, capital expense | \$16,000.00 |
| 1996 | Granted | Refrigerated truck | \$3,800.00 |
| 1997 | Granted | Equipment for Food Repackaging Room for meal rescue program | \$9,200.00 |
| 1999 | Granted | Cooler and condensing unit | \$14,394.00 |
| 2000 | Granted | One low-lift pallet truck and three sets of racking | \$4,549.00 |
| 2001 | Granted | To purchase food for city residents | \$3,000.00 |
| 2004 | Granted | Pay for renovations to the facility | \$13,294.00 |
| 2006 | Granted | To install lights, replace door, reinstall floor scale, and purchase safety equipment for two trucks. | \$6,670.00 |
| 2008 | Granted | To purchase a refrigerated cargo van for use in the Meal Share prepared food rescue program. | \$31,414.00 |
| 2011 | Granted | To pay for salaries and equipment to expand capacity of their operations. | \$10,750.00 |
| 2012 | Granted | Meal share program equipment replacement | \$13,895.00 |
| 2013 | Granted | To purchase two electric Walkie Pallet Trucks and to pay for passive refrigeration supplies and equipment including portable coolers, reusable Ice Pack Sheets, and insulated blankets and pallet covers. | \$9,930.00 |
| 2014 | Granted | To purchase a 5000-pound capacity fork lift to be used primarily to improve collection and delivery of food to agencies serving residents of the City. | \$20,000.00 |
| 2016 | Granted | To purchase and install a lift gate for the Food Bank's primary food collection and delivery truck. | \$12,000.00 |
| 2018 | Granted | Insulated Refrigerator Van | \$30,000.00 |

Staff Comments

(Very Good) Fiscal Leveraging – *The request of \$5,000 is leveraged by a \$65,000 private challenge grant toward a \$140,000 vehicle which, as noted in the Other Comments section, amounts to 4% of its cost. Also see the Program Budget and the response to Other Funds Expected for this Project (page 6) for more on other contributions and cost.*

Other Comments Section – *Please see this section for additional rationale for going forward with this project this year. It also notes that the Jumbo Truck will be built-to-order and take about nine months to be delivered. Please note that under Project Costs (page 5), the agency will seek reimbursement this year based upon the deposit on this order.*

Maintenance Vehicle to Support Group Homes and Low Income Housing- \$20,000

City Residents Served: 46 (of 61 Directly; 60 employees, about 150 clients Indirectly)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 161 | 61 | 100 |

Mission: To partner with people of all ages and abilities to lead meaningful and active lives. We promote independence for people with disabilities. Our core mission is providing staff supports to people with intellectual and developmental disabilities focusing on achieving independence through housing, employment, and establishing a network of supports around them. Our core programs support people to build life skills, employment skills, and develop relationships with other community members.

Project Synopsis: We are requesting **\$20,000** for the one-time, capital purchase of a new or used maintenance truck and snow plow in order to reduce our current expenses, ensure our parking lot is safe in the winter for staff and clients, and to provide more efficient service to our residents who live in group homes and low income housing owned by LIFE Designs.

LIFE Designs owns low income and permanent supportive housing. This allows us to offer our clients integrated accessible and affordable housing, which is a great need in Monroe County. Because of the University and a great demand for student housing, market rate housing is priced far out of budget for someone with a disability whose ability to work may be limited. Our focus on supporting people to achieve independence relies heavily on being able to find housing that is accessible to their needs inside the home and provides access to community resources like public transportation. Since becoming a low-income housing developer, we now own a 10 locations or facilities in Monroe & Owen counties which we're responsible for maintaining. We have 2 maintenance employees (1 full time and 1 part time) to maintain these properties. Our current maintenance vehicle is an old van that we retired from transporting clients. It's in great need of replacement and repairs to keep it going are more than its value. Additionally, our maintenance staff will be able to work much more effectively.

Criteria:

Need – The Monroe County United Way’s SCAN conducted in 2012, although dated, identifies priority areas still exceptionally relevant to the current needs of the Bloomington community. Our request for funding directly serves those citizens in affordable housing units who rely upon low income subsidies and accessible options. In addition, our proposal increases the ability of our organization to serve vulnerable populations, chiefly those with disabilities.

The City of Bloomington’s Housing and Neighborhood Development Consolidated Plan corroborates and reinforces the needs identified in the SCAN. The burden of housing costs means many residents of Bloomington depend upon supported living/affordable arrangements like Crawford and Options. Challenges abound when an individual or family must contend with accessibility and inclusion due to disabilities. The Special Needs Assessment of the 2015 – 2019 Consolidated Plan outlines the utmost need in our community for services, housing, and inclusion for people relegated in the past to the fringes of society. Our proposal for new maintenance equipment provides another layer of stable and professional services to the existing operations of LIFE Designs and increases our capacity to serve those in the community most in need.

One-Time Investment - This is a request for a one-time capital purchase. We already budget for repairs and maintenance on our current maintenance vehicle, which is very old and needs much greater repairs than a new(er) vehicle would. We expect the new vehicle would decrease our operating budget through needing fewer repairs and removing the expense of contracting out snow removal on all 10 of our properties. With proper maintenance we expect this truck to last for at least 8-10 years or more.

Fiscal Leveraging – The numbers we’re using are based on a new F-250 4-wheel drive, extended cab, long bed, with snow plow and tow package. Ford is offering an in-kind discount of \$11,528. Additionally, we are submitting a grant request to the Smithville Charitable Foundation, for \$10,000 and to Owen County Community Foundation for \$2500. Upon receiving notification of grant awards, we plan to approach some of our donors to contribute to the project as well. We feel confident we would be able to gain support from our donors if we are successful in receiving grant awards from SCF and JHSSF.

Broad & Long-Lasting Effects – In the long-term, LIFE Designs and our clients will recoup numerous benefits from the investment in a maintenance truck, snow plow, and toolbox. We will reduce expenditures on yearly snow and ice removal by nearly \$12,000 every three years—earning a net savings well within the lifetime of the new equipment. Furthermore, the maintenance staff will experience an

increased capacity for serving the needs of our low-income housing residents and clients, especially compared to the current inefficiencies of an outdated van. Crucially, many more clients, staff, and visitors of LIFE Designs' facilities in times of inclement weather benefit directly from a safer environment. As a significant portion of those we serve have physical disabilities or mobility concerns, internal ability to address the weather allows for the services and supports we provide 24/7 to continue no matter what. Ability to address maintenance and upkeep challenges more effectively in the next 10 years offers our supported group living and low-income housing clients a more stable environment in which to grow and succeed.

Outcome Indicators: We expect to reduce our expenses by eliminating our need to contract for snow removal on all our properties in Monroe and Owen counties. Over the past 3 years we've expended \$11,547 for snow removal. We would measure the effectiveness by looking at our expenses through next winter.

Our maintenance staff will be more effective with the right tools. We'll measure his effectiveness by surveying or interviewing clients and staff, and reporting on new activities and increased efficiencies. Our maintenance staff will be a resource for evaluating efficiencies. Our Director of Facilities will oversee the budget and surveys or interviews.

Cost

Amount Requested (*in order of priority*)

| | |
|--------------------------------|--------------------|
| 1. Ford F-250 | \$17,000 |
| 2. Snow Plow Package | \$2,500 |
| 3. Locking, Single-Lid Toolbox | \$500 |
| 4. | |
| TOTAL REQUESTED | \$20,000.00 |
| Total Project Cost | \$49,233.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|-----------|---------|---|-------------|
| 1997 | Granted | OPTIONS: Upgrading phone and voicemail system | \$13,500.00 |
| 1998 | Granted | OPTIONS: Repair 1991 Club Wagon for client purpose | \$3,000.00 |
| 2000-June | Granted | OPTIONS: Materials, computer, and furniture for resource library | \$5,000.00 |
| 2001 | Granted | OPTIONS: To purchase CPR training equipment to train staff | \$4,966.00 |
| 2002 | Granted | OPTIONS: Materials for program between Options and Center for Behavioral Health to address persons with dual diagnosis | \$5,000.00 |
| 2003 | Granted | OPTIONS: Materials for resource library and speaker fees, Family Partnership | \$1,725.00 |
| 2004 | Denied | OPTIONS: Career Exploration Day Transportation and Costs | \$2,400.00 |
| 2005 | Granted | OPTIONS: Modify wheelchair accessible van for community participation program | \$7,500.00 |
| 2006 | Granted | OPTIONS: Format and rebuild computers and install modems and software as part of the Equalizing with E-cycling program | \$4,000.00 |
| 2008 | Granted | OPTIONS: Purchase refurbished computers, modems and internet services to link between community living homes and the main office | \$4,000.00 |
| 2010 | Granted | OPTIONS: Pay for software, training, video production and resource materials for the Power Up program | \$9,750.00 |
| 2011 | Granted | OPTIONS: Purchase a scanner for the Electronic Records project | \$3,100.00 |
| 2008 | Granted | CHRISTOLE: Pay for installation for a fire sprinkler system in the group home at 1701 Winslow | \$3,500.00 |
| 2010 | Denied | CHRISTOLE: D-Spa Training Conference Lead Trainer | \$2,000.00 |
| 2013 | Granted | To purchase the College of Direct Support and College of Employment Services training packages and to pay for the administrative and performance management fees associated with these training packages. | \$13,470.00 |
| 2014 | Granted | To purchase furniture for bedrooms along with furniture and entertainment equipment for common areas at the Dunn and Winslow homes (located within the City). | \$7,090.00 |
| 2015 | Granted | To purchase the College of Direct Support and College of Employment Services training packages and to pay for the administrative and performance management fees associated with these training packages | \$13,470.00 |
| 2016 | Granted | To pay for the purchase of a wheelchair-accessible vehicle. | \$14,000.00 |
| 2017 | Granted | To purchase tablets, mobile briefcases, and design services for the LIFE Designs Mobilizing Work Project. | \$15,000.00 |
| 2017 | Granted | To purchase Chromebook computers and internet access for residents of Crawford I, Crawford II, and Crawford's scattered sites and to provide staff support for the same as part of the Crawford Homes Technology Access Project. -- Collaborative | \$27,949.00 |
| 2018 | Granted | Crawford Homes II Housing First Program -- Collaborative | \$10,800.00 |

Staff Comments

Project Budget/Project Costs – *Please see the Dealer materials for total costs - \$43,010 (base price), \$5,528 (snowplow), and \$695 (tool box) = \$49,233 – and the Project Budget for contributions and discounts.*

Financial Statements – *The financial statements are voluminous largely due to separate accounting for each facility.*

13. MADE UP MIND, INC

MUM Community Center- \$18,900

City Residents Served: ~20 individuals+family (of ~20 +40-60)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~30 |

Mission: Our mission is to develop the capabilities of ex-offenders who have made up their mind to stay out of prison, through our transitional life training and hands-on work experience, thus breaking the cycle of homelessness, addiction, and incarceration.

MUM was incorporated in November of 2017, in light of our growing community challenge to reunite and heal families that are handicapped by their traumatic experiences of incarceration, addiction, and poverty. MUM exists to help ex-offenders navigate the landscape of social services in Bloomington, and to provide an individually-tailored, relationship-centered support structure that weaves-together existing ex-offender services while supplementing service-gaps with unique courses, programs, and personal development opportunities that, in combination, restore client self-sufficiency, family relations, and sense of community.

Project Synopsis: MUM is requesting \$18,900 to run our MUM Community Center Pilot Project. Though Bloomington has a unique wealth of social service organizations, navigating the landscape of programs and services can be challenging for recently-released ex-offenders. Through our working relationships with Centerstone, POPs, New Leaf New Life, Shalom Center, and St. Vincent de Paul, MUM assists with this navigation by weaving-together diverse services into a personally-tailored, wrap-around structure for building self-sufficiency; however, the most consistent challenge we face is logistical: coordinating rides to dozens of locations in and around town – the courthouse, parole offices, community organizations, counselors/mentors, trainings, job opportunities, volunteer opportunities – consumes much of our time (coordination and transportation), increases our costs (fuel, driver-time), and increases our liability (due to normal road and traffic hazards exacerbated by time on the road).

Hence, we believe that our organization could operate with much greater efficiency – stretching the impact of each donation and providing services to more clients – if we could centralize service provision at a one-stop-shop location. Further, keeping the space open to the public can create a place of encounter for fostering new relationships, learning new skills, and helping similarly disadvantaged members of the community access free and low-cost services. This would be an innovative model, both for MUM and for Bloomington, so we believe it is well worth Piloting the project, to determine the extent to which we should guide future investment towards a more permanent MUM Community Center arrangement.

By securing equipment donations and devoting many hours of service, our dedicated volunteers have already begun to turn our blank, empty storefront into the beautiful beginnings of a multi-purpose community service center. JHSS funding will help cover operating expenses of this Pilot project – rent, internet connectivity, & open-hours staffing – while MUM will match these proceeds, both in monetary value and volunteer hours.

Criteria:

Need – The 2012 SCAN Assessment identified declines in access to job training (p.72), finding a job that pays enough to meet a family’s basic needs (p.17), and ability to pay for essentials such as housing, utilities, and food (p.76), with 40% of these families facing disruptions in their lives due to drug/alcohol abuse (p.106). This defines our local barriers to putting together the building blocks of a better life. The HAND 2015-2019 Consolidated Plan similarly identified substance abuse related services and job training/employment services as critical needs for our community.

MUM believes that poverty, coupled with a lack of opportunity, breeds crime which is why having a community center that can provide a safe space with all the building blocks of a healthier life is so important for people like our clients. Our community center offers immediate employment through our social-enterprises, job training, transportation, job certifications, classes on healthy relationships, meditation, Toastmaster groups, budgeting classes, free use of workout equipment to stay in shape for laborious jobs, free haircuts, and, most importantly, access to our growing network of employers that will work with individuals who have criminal records.

Many of these resources have been run by our volunteers, in the time they have to spare; but, with JHSS support, our clients will have access to them all, for 40 hours a week, in a single, safe location that is an easily accessible place for healing and personal growth. The MUM Community Center will be a Pilot project while MUM continues to grow its existing social enterprises

One-Time Investment – The MUM Community Center will be a Pilot project while MUM continues to grow its existing social enterprises (Big Boys Moving and Gardens by Ana). MUM, itself, began as a 2-year Pilot project - run with the support of value-aligned businesses and volunteers – and we were so successful that we’ve now grown to become a fully incorporated, community-based nonprofit. MUM has been designed as a self-sustaining nonprofit that operates and plans future growth by leveraging funds through monetary and in-kind donations, fundraising, volunteer labor, and financial/job-placement support from our social-enterprises. Nonetheless, our need for a community center is very immediate, as we have a growing list of potential clients and other individuals in our social-enterprises. Nonetheless, our need for a community center is very immediate, as we have a growing list of potential clients and other individuals in our community who would greatly benefit right away.

Fiscal Leveraging – MUM minimizes costs through dedicated volunteer work and support from partnered businesses. MUM also requires clients to give back through volunteer hours whether it be done with MUM or other non-profits such as St. Vincent de Paul. MUM carries its own D&O insurance but the work done off premises is covered by the insurance of partnered businesses. MUM will still leverage both monetary and in-kind donations and fundraising events.

| Sources for 2019 | Promised | Applied | Secured |
|---------------------|----------|----------|---------|
| Big Boys Moving LLC | \$35,000 | \$24,000 | |
| Gardens by Ana | \$5,000 | \$1,100 | |
| Monetary Donations | | | \$2,100 |

Broad & Long-Lasting Effects – The MUM community center will provide a safe space for individuals who would otherwise loiter in our parks and public properties. For example, the men who reside at the Wheeler Mission Men’s Shelter will be able to come utilize our community center resources, when they have to leave the mission by 7am (they can only turn-in hand-written job applications for so many hours of their day, and coming to us would keep their hands and minds occupied and moving forward). At the MUM community center, they will be able to fill out applications online and practice other job-related skills, all while having access to the rest of the center’s resources and a network of peers committed to growing self-sufficiency.

In other cases, men and women – who have a place to stay but who are still on probation or parole – will be able to come to our center to meet their probation/parole officer and then attend classes or programs, right after. For those in the process of finding a job, the center provides a drug free environment where they don’t have to be around family stressors, wayward peers, or other distractions that may have been an issue for them, in the past.

Overall, it will be a community center that empowers people into self-sufficient living, while instilling a Made Up Mindset of doing “whatever it takes” to transform past barriers into future stepping stones, helping Bloomington to become a safer and healthier community for everyone.

Outcome Indicators: MUM will measure:

- Number of Clients and Bloomington residents served (including nonresidents that are receiving local social services).
- Recidivism rate of clientele.
- Clients’ ability to secure and retain employment during their involvement in MUM and for 1 year (minimum) after they complete the program.
- Quality of Life Improvements (general index) – ability to meet material needs (client earnings vs Monroe County cost-of-living data); social-network growth (number of new/returning family members, friends, and mentors); volunteer service growth (number of hours served); personal-development growth (skill-seeking through course registrations and program participation).
- Tracking clients’ progress toward self-sufficiency – their ability to meet their basic needs for housing, transportation, clothing, food, as well as their unique needs for backpay of child-support and/or restitution/court-fees.
- Tracking how many people were served – and with which services – to evaluate which services are in highest demand.
- Tracking the number of new partnerships created for or by the operation of the community center.

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| Rent Cost (6 months of rent June-November) | \$8,100 |
| Internet | \$1,200 |
| Staff Positions-(6 months - 20 hrs/week x \$10/hr per position) (2 people always there each 40 hrs) (this is matched by volunteers from MUM & other work experience programs such as POPS) | \$9,600 |
| Total Requested | \$18,900 |
| Rent Cost (6 months June-November) | \$8,100 |
| Internet | \$1,200 |
| Staff Positions-(6 months-15 hrs/week x \$10/hr per position) (2 people always there each 40 hrs) (rest fulfilled by volunteers from MUM & other work experience programs such as POPS) | \$7,200 |
| Total Requested | \$16,500 |
| Rent Cost (6 months of rent June-November) | \$8,100 |
| Internet | \$1,200 |
| Staff Position- (6 months - 20 hrs/week x \$10/hr) (2 people always there each 40 hrs)(rest fulfilled by volunteers from MUM & other work experience programs such as POPS) | \$4,800 |
| Total Requested | \$14,100 |
| Rent Cost (6 months June-Nov. ½ matched by in-kind donation) | \$4,050 |
| Internet | \$1,200 |
| Staff Positions-(6 months - 20 hrs/week x \$10/hr per position) (2 people always there each 40 hrs) (this is matched by volunteers from MUM & other work experience programs such as POPS) | \$9,600 |
| Total Requested | \$14,850 |
| Rent Cost (6 months June-Nov. ½ matched by in-kind donation) | \$4,050 |
| Internet | \$1,200 |
| Staff Positions-(6 months-15 hrs/week x \$10/hr per position) (2 people always there each 40 hrs) (rest fulfilled by volunteers from MUM & other work experience programs such as POPS) | \$7,200 |
| Total Requested | \$12,450 |
| Rent Cost (6 months June-Nov. ½ matched by in-kind donation) | \$4,050 |
| Internet | \$1,200 |
| Staff Position- (6 months - 20 hrs/week x \$10/hr) (2 people always there each 40 hrs)(rest fulfilled by volunteers from MUM & other work experience programs such as POPS) | \$4,800 |
| Total Requested | \$10,050 |
| Rent Cost (6 months of rent June-November) | \$8,100 |
| Internet | \$1,200 |
| Total Requested | \$9,300 |
| TOTAL REQUESTED | \$18,900.00 |
| Total Project Cost | \$61,200.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|--------|-------|--------|
| N/A | | | |

Staff Comments

New Applicant – 501(c)(3) Notice dated July 19, 2018

City Residents Served – Given the reliance of JHSSF on City taxpayer funds, the Committee may want to have these figures clarified. As with responses from some other agencies, the figure goes beyond actual clients to family members who benefit from the client's success. Also, an inquiry into how residency is determined might be useful.

Program/Project Budget – While one can piece together the costs and contributions from various sections (e.g. the Partial Funding), no Program/Project Cost/Funding sheet was provided (as requested in the Solicitation materials).

Site Use - Commercial General (CG) District – According to the City's zoning map, the site (830 West 17th Street) is in Commercial General (CG) District which allows for a broad set of uses that encompass those mentioned in the application. However, given its relative newness, the Committee may want to inquire about how the agency relates to its neighbors.

Other Comments Section - See this section for agency history (1st year,) services provided (e.g. transportation, classes, job and career guidance, reconciliation services, and exercise machines), and successes (helped 22 ex-offenders find jobs with only 2 returning to jail).

Middle Way House Safety and Accessibility Upgrades- \$7,470.00

City Residents Served: 630 (of 1,050)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 26 | 42 | >200 |

Mission: Middle Way House's mission is to end both structural and interpersonal violence. Middle Way House envisions a community where individuals live free from violence and the threat of violence; a community characterized by equality across the gender spectrum and social and economic justice; a community where everyone’s contribution is honored and individual and group differences are valued; a community where everyone is adequately fed, housed, educated and employed; a community that provides opportunities for meaningful participation, personal growth, and creative expression.

Project Synopsis: Middle Way House is requesting \$5,470 to purchase four automated external defibrillators (AEDs) and accessories for our Child Care, Administration, Emergency Shelter and Transitional Housing Programs. Having AEDs onsite will strengthen the chain of survival for our staff, residents, tenants, volunteers and clients.

An AED is an electronic device designed to deliver an electric shock to victim of sudden cardiac arrest. Ventricular fibrillation may be restored to normal rhythm up to 60 percent of the time if treated with an AED.

Middle Way House also requests \$2,000 to purchase four ADA Compliant Guest Room Kits for deaf or hard of hearing residents. Per the Americans with Disabilities Act guidelines, shelters must provide “effective communication” options. Each kit includes a teletypewriter (TTY), door knock sensor, telephone amplifier, telephone signaler, and an alarm clock with bed shaker for vibrating wake-up alarms to ensure optimal communication with hearing-impaired survivors.

In total, Middle Way House requests \$7,470 in Jack Hopkins Social Services Grant funding to provide our emergency shelter and transitional housing facilities with critical tools that will benefit the health and safety of our residents.

Criteria:

Need – This proposed project will directly benefit homeless families, especially women and their children, in need of emergency shelter as a consequence of experiencing violence in the home. Elders and survivors living with opioid addictions are at increased risk for cardiac arrest and on-site AEDs will significantly improve survival rates for these especially vulnerable individuals at Middle Way House and The Rise. ADA-compliant room kits will benefit deaf and hard-of-hearing survivors, providing them with tools for optimal communication with shelter and transitional housing staff.

The City’s Consolidated Plan 2015-2019, the Homelessness Strategy (91.215(d) pg. 104) states that the City of Bloomington will continue to support efforts that address emergency and transitional housing needs for "victims of domestic violence." Further, the South Central Housing Network’s Heading Home: A Regional Plan to Make Homelessness Rare, Brief & Nonrepeating report’s strategies include using Transitional Housing strategically to focus on survivors of domestic violence.

MWH is an active participant in the City’s Anti-Poverty Strategy (92.215 (j) pg. 108), providing Essentials (self-sufficiency programs, case management, appropriate counseling referrals), Education (life-skills development, support for raising clients’ education attainment levels) and Assistance to Increase Earnings (pre-employment training and job placement assistance).

One-Time Investment - Our project involves a one-time purchase of physical equipment to improve services and address safety concerns for Middle Way House clients.

Fiscal Leveraging – The provision of physical emergency safety equipment and communication tools will demonstrate the agency’s dedication to serving all survivors, including those living with addictions and disabilities, both underserved populations at increased risk for domestic violence and sexual assault. We believe this project will lead to increased awareness of our services in these underserved populations and allow us to build connections with other agencies, grantors, and volunteers invested in direct service at the intersection of disability, addiction, and survival of violence (including physical, sexual and human trafficking).

Broad & Long-Lasting Effects – Installing AEDs in our facilities may help save a client, staff, or volunteer’s life while they are at Middle Way House. AEDs save precious treatment time and improve survival odds when used before emergency medical service (EMS) personnel arrive. Each year EMS treats nearly 300,000 people who suffer cardiac arrest outside of the hospital. More than 92 percent of cardiac arrest victims don’t survive. In cases where defibrillation is provided within 5-7 minutes, the survival rate is as high as 45 percent.

To provide the best care for individuals who actively use opioids, AEDs are crucial. MWH keeps stock of Narcan to assist in any on-site overdoses; however, overdoses can result in sudden cardiac arrest and require immediate use of an AED.

The provision of Americans with Disabilities Act compliant kits for deaf and hard-of-hearing clients in residence at our emergency shelter or transitional housing facilities ensures safe and effective communication between clients and staff, particularly in emergency situations. The CDC (2017) reports that approximately 3.9% of Hoosiers 18 or older have a hearing disability.

Outcome Indicators: In 2018 our agency served 11 hearing-impaired clients and the need for ADA Compliant kits became evident. We anticipate serving at least as many clients in 2019 who will benefit from use of the kits to improve the quality of their service experience at Middle Way House.

Regarding the ADAs, of course we hope that there will never be an instance in which they are required. Their installation in our facility is a case of adhering to best practices for shelter and residential health and safety, as outlined by the Indiana Coalition Against Domestic Violence and national shelter programs. All residents, staff, volunteers, and visitors (more than 1,770 individuals in 2018) to our agency will benefit indirectly and potentially directly from the presence of these life-saving devices.

Cost

Amount Requested (*in order of priority*)

| | |
|--|-------------------|
| 1. 4 automated external defibrillators (AEDs) and accessories | \$5,470.00 |
| 2. 4 ADA Compliant Guest Room Kits for deaf or hard of hearing residents ($4 \times 489 + \$25$ [shipping] = ~ \$1,981) | \$2,000.00 |
| TOTAL REQUESTED | \$7,470.00 |
| Total Project Cost | \$7,470.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|---------|---------|---|-------------------------|
| 1993 | Denied | Transitional housing project and day care center | \$34,000.00 |
| 1994 | Granted | Women's and children's transitional facility | \$35,000.00 |
| 1996 | Granted | Child care facility | \$17,350.00 |
| 1997 | Denied | Construction Fees | \$10,000.00-\$25,000.00 |
| 1999 | Denied | Interim Salary for Coordinator | \$20,000.00 |
| 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 | \$2,545.00 |
| 200-Oct | Granted | To buy an Industrial Grade document scanner for Confidential Document Destruction Program | \$3,211.00 |
| 2001 | Granted | To support pilot childcare nutrition program/enterprise by paying salaries of cook | \$23,885.00 |
| 2003 | Granted | Purchase thermal carriers; pots, pans, and food trays; and, dishwasher proof dishes and flatware in order to extend program to Area 10 Agency on Aging | \$4,100.00 |
| 2004 | Granted | Pay a portion of salary and benefits for a Housing Specialist who will develop a cooperative housing program & facility for low-income women | \$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 | \$55,000.00 |
| 2009 | Granted | To purchase beds and mattresses for the Emergency Shelter. | \$10,500.00 |
| 2010 | Granted | To purchase Food Works Kitchen equipment, including: an ice machine, a coffee maker, a pH meter, a mixer, an electric pasta machine and two pasta-machine cutters, an electric stone mill and a dehydrator for the facility located at 318 South Washington Street. | \$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 | \$25,000.00 |
| 2015 | Denied | To purchase a high-speed, fiber-optic, integrated internet/phone system and a server, to meet crucial funding requirements and enable more efficient response to emergency assistance and legal advocacy service requests. | \$25,000.00 |
| 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 |

Staff Comments

Request/Project Cost – *The Request of \$7,470 appears slightly higher than the apparent costs for the equipment (~ \$7,451) which, if correct, is due to the lower cost of the ADA compliant Guest Room kits. The Committee may want to confirm the difference and, if confirmed, account for that in the award.*

Financial Statement – *While a Profit & Loss Statement was included, there was no Asset Balance Sheet provided.*

Emergency Housing Facility- \$100,000

City Residents Served: 50+ (of 50+)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 5 | 6 | 50+ |

Mission: MCHA is dedicated to promoting the welfare of animals, strengthening the human-animal bond, and providing access to accessible veterinary care and humane education across our community.

To accomplish our mission, we provide:

- Direct veterinary services to help animals and animal owners;
- A thorough humane education platform that reaches youth and adults across the community;
- Volunteer animal therapy teams sharing the benefits of the human-animal bond;
- Resources and trap-neuter-return assistance for caretakers of feral or outdoor cats;
- Facilitate emergency foster, temporary housing and disaster response;
- A pet food and supply pantry with free or very low-cost pet food, treats, supplies, and care items;
- Veterinary care sponsorship for extreme injury/illness veterinary care and the prevention of accidental litters

Project Synopsis: We are requesting \$100,000 to support the construction of an Emergency Housing facility. The 800 square foot specialty facility will be new construction on MCHA property allowing housing for up to twelve dogs, crate storage, and both animal care and exam space. As the designated response partner for both Homeland Security and Monroe County Emergency Services for animal services, the operation of an Emergency Housing facility is imperative to both our current emergency housing program and our ability to appropriately coordinate care in the event of a local disaster.

Criteria:

Need – Temporary housing and sheltering are a previously identified priority for our community, however, there are even fewer opportunities for co-housing for families with pets. Many families with pets will not leave their situation if they cannot either leave with their pet or have safe placement for their pet that offers reunification. Two-thirds of American households have pets, meaning in any local disaster, there will be a significant number of families with pet related needs seeking housing. Studies show as many as 48 percent of domestic violence victims may put off leaving their abusers out of fear for their pets’ safety. Creating an Emergency Housing facility will meet these current unmet needs of our community by creating a shelter that is dedicated to pet reunification for families with pets. The Emergency Housing shelter will operate as a first phase housing center in any disaster response, then coordinating to a larger, temporary shelter onsite. Without this facility as a response center, there is nowhere to coordinate the efforts for a local disaster or a 24/7 facility offering a safe haven for pets of those that find themselves in need of emergency housing due to domestic violence, fire, or extreme weather.

One-Time Investment - MCHA is seeking the one-time costs to support the construction of the building to house the Emergency Housing Facility on MCHA property.

Fiscal Leveraging – The Emergency Housing program will create additional opportunities for on-site volunteers seeking hands-on animal care roles. The on-site, dedicated facility will allow MCHA to expand our housing services to our current partners seeking to provide supportive services to families with pets. MCHA will also become eligible for additional grant opportunities to support the operating costs of emergency housing programs. In-kind donations of pet food, care and supply items will directly support this program.

Broad & Long-Lasting Effects – The Emergency Housing facility is a permanent and life-long investment into an animal friendly community that knows and believes how important pets are. There are currently no co-housing or low-cost boarding opportunities for families with pets in the event of a personal emergency, medical stay or local disaster. This permanent facility will be dedicated to families with pets that cannot afford traditional boarding opportunities or the costs associated with a pet friendly hotel. All MCHA programs and services directly support a life-long pet-owner relationship. Current city shelter housing requires relinquishment of the pet or housing for a maximum of four days before the pet becomes property of the city shelter. If a pet is reclaimed within four days, a multitude of fees associated with housing are applied. The Emergency Housing facility will be able to offer both short and extended housing options for low or no costs associated to families for years to come. The facility will be part of the Monroe County Humane Association Animal Care Campus, dedicated to providing services towards a lifelong, healthy and responsible pet-owner relationship.

Outcome Indicators: For families seeking emergency housing due to personal related emergencies, MCHA seeks to maintain a reunification rate of 95%.

In the event of a local disaster, the Emergency Housing center would become the primary response center for animal intake and housing for both local emergency responders and volunteers. There is currently no other declared emergency shelter for pets in the event of a local disaster.

Cost

Amount Requested *(in order of priority)*

| | |
|---------------------------|---------------------|
| 1. Building Construction | \$80,000.00 |
| 2. Kennel Construction | \$20,000.00 |
| TOTAL REQUESTED | \$100,000.00 |
| Total Project Cost | \$100,000.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|--------|----------------------|------------|
| 2001 | Denied | Spay and Neuter Pets | \$6,000.00 |

Staff Comments

Rationale for JHSSF Application – *While the request would construct a shelter for animals, the Application indicates that pets of persons seeking emergency housing for themselves and their household will be provided shelter at little or no cost to those persons. This rationale is set forth in the Need, Longlasting Effects, and Other Comment sections of the application.*

Request for Capital Improvements Outside of City Limits – *The site of this capital project is outside of the City (791 S. Fieldstone Boulevard) – per the City website. According to the JHSSF Elaboration of Criteria – Criteria 1, City Residency: “... Programs must primarily serve City residents. Individual programs have occasionally been located outside of the City but, in that case, these funds have never been used for capital projects (e.g. construction, renovation, or improvement of buildings).”*

16. MONROE COUNTY UNITED MINISTRIES

Secure & Sustainable MUM- \$39,132.18

City Residents Served: 1,488 (of 1,730)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 26 | 27 | 108 |

Mission: Monroe County United Ministries creates lasting solutions to economic, educational and social injustice in our community through quality services, collaboration and innovation.

Project Synopsis: We are requesting \$35,351 for an urgent and unexpected need to replace the security system at MCUM’s Administration & Self-Sufficiency Center and Compass-North site and \$3,781.18 for energy efficient lighting.

Jack Hopkins funding will help keep MCUM’s 53 staff and the 130 children and 1,600 households we serve over the course of one year safe and will also contribute to an energy overhaul that will save the agency 73% on our energy bill due to more efficient lighting.

As part of a larger undertaking, we seek Jack Hopkins funding specifically to:

- Update a 24-year old security system that will be obsolete in 2020;
- Install new fire protection/security to two buildings, and;
- Upgrade 180 lights in our Compass-North building & 98 lights in our Administration building to more efficient lights.

Criteria:

Need – Monroe County United Ministries (MCUM) provides much-needed services to Monroe County residents.

The Consolidated Plan ranked affordable childcare as a “close second” as “the most critical need for our community” (55). The number of children in Monroe County in the 0-4 age group has increased by 9% in recent years (SCAN 50), while spaces in licensed centers have decreased. Compass Early Learning Center provides 180 spots and offers a sliding-fee scale to parents that caps the of care at 10% of their household income, greatly reducing the financial burden of childcare while also removing a barrier to employment or higher education opportunities. Compass Early Learning Center enables low-income parents to “maintain stable income, retain income, and [potentially] build savings and assets” – stated goals of the Anti-Poverty Strategy (4B-abc).

MCUM’s Self-Sufficiency Center provides both basic needs assistance (food, cleaning/hygiene items, clothing, etc.) as well as long-term goal setting and asset-building that helps empower the household to build financial self-sufficiency. Many of our households receiving assistance are “forced to choose whether money should be spent on food, medical bills, or other essentials” (SCAN 128), with up to 42% reporting having some degree of difficulty meeting their basic needs each month (130).

A sound infrastructure is essential to providing these services. Additionally, every dollar that can be saved with improved energy efficiency will more directly benefit the children and families MCUM serves.

One-Time Investment - This project will fund important capital improvements that will replace equipment that is becoming obsolete and lighting that is not efficient. Our previous security and fire protection system is 24 years old and has never been replaced. We expect the new system to last just as long.

A complete lighting overhaul will allow the agency to enjoy the greatest financial savings and project longevity. In the main office and Self-Sufficiency Center, the 5-year savings from improved lighting is quoted at \$18,868 and in Compass-North it is \$27,401. While lights will eventually need to be replaced, the savings generated by the overhaul will sustainably finance the cost when it is time to replace them.

Fiscal Leveraging – This project is essential to MCUM’s ability to provide important services to Monroe County residents. Clients, staff, donors, volunteers, and all who visit MCUM should feel they are in a secure environment where appropriate measures have been taken to insure their safety. A more secure site is likely to help keep Compass-North’s enrollment at capacity and retain staff and volunteers. Additionally, the confirmed funding sources listed above, along with Jack Hopkins funds to push the fundraising close to the amount needed for the project will help attract donors to this capital

improvement project, whereas a large funding gap may decrease the likelihood that a donor would contribute to this project, as it is not directly funding our programs.

Broad & Long-Lasting Effects – This project will ensure resources are being effectively the community issues we seek to reduce, per our mission statement.

Having a security system is essential to the well-being of the staff, clients, and resource if not for security system. A motion-sensed alarm activated outside of business hours will signal potential break-ins, and a panic button will automatically alert the police and send them to MCUM if activated. While incidents are few and far between over our 80-year history, we have had staff leave the agency and parents pull their children from our program following safety threats and have dealt with several break-ins and attempted break-ins that threaten the ability of our program, particularly the food pantry, to serve as many clients. Our previous security system is 24 years old and has never been replaced.

The energy efficient lighting ensures MCUM will not incur unnecessary energy loss expenses, sustaining our overall capacity to serve. Let It Shine Lighting LLC estimated that within 16 months of installing the lights, MCUM will save 74% or more on our electricity bill, which amounts to about \$46,269 over five years offset from our operating budget. **That savings represents the equivalent of subsidizing the cost of care for the 22 preschoolers at Compass-North enrolled on MCUM's fee scale for two years or operating MCUM's food pantry in full for four years.**

Outcome Indicators:

- 1,462 SSC Clients (1,301 City) with new/improved access to the Self-Sufficiency Center.
- 219 Compass-North parents who will be relieved by the improved building security.
- 180 Compass-North children (122 City) who will be better protected due to increased security.
- 1,462 SSC clients in one year protected from fire.
- 202 Compass-North children & staff in one year protected from fire.
- 53 MCUM staff with increased and improved security in their workplace.

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| 1. Compass-N fire alarm replacement | \$12,322 |
| 2. SSC fire alarm replacement | \$19,134 |
| 3. Security System, SSC & Compass-North | \$3,895 |
| 4. Lighting, Compass-North | \$13,166 |
| 5. Lighting, Self-Sufficiency Center | \$8,390 |
| TOTAL REQUESTED | \$39,132.18 |
| Total Project Cost | \$56,907.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|---|-------------|
| 1996 | Denied | Facility Addition - Daycare | \$50,000 |
| 1997 | Granted | Addition and renovation of child care facility | \$51,000 |
| 1998 | Granted | Renovate existing building to meet new building code | \$9,925 |
| 1999 | Granted | Equipment for food area | \$11,850 |
| 2001 | Granted | To pay rent and utilities for city residents at risk of being dislocated | \$32,884 |
| 2003 | Granted | Subsidize childcare costs for low-income households within the City | \$20,000 |
| 2004 | Granted | To subsidize child care services for low-income city residents primarily during the summer months | \$15,000 |
| 2005 | Granted | Caseworker salary for Emergency Services program | \$16,000 |
| 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 <i>Affordable Childcare</i> program located at 827 West 14th Street Court. | \$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 | \$50,990.00 |
| 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. 14th 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 |
| 2018 | Granted | Equipment upgrades and additional staffing for Compass Early Learning Center | \$14,014.00 |

Staff Comments

The total cost of the project is \$56,907 of which MCUM has secured funding for \$17,774.82 and is asking the Hopkins Committee for the balance. The ranked funding priorities outlined all components of the project, not just those that are Hopkins specific.

17. MOTHER HUBBARD’S CUPBOARD

Technology Upgrade- \$9,695

City Residents Served: 9,074 (of 14,635)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 6 | 2 | 500 |

Mission: Mother Hubbard’s Cupboard’s (MHC) mission is to increase access to healthy food for all people in need in ways that cultivate dignity, self-sufficiency, and community. MHC provides healthy, wholesome food to people in need, and equips people with the skills, knowledge, and tools to grow and prepare their own food, making nutritious food and wholesome meals more accessible. MHC’s five programs (Food Pantry, Garden Education, Nutrition Education, Advocacy, and Tool Share) form a holistic approach to tackling the issues of hunger and food insecurity. All MHC programs focus on serving low-income families at or below 200% of the federal poverty line. MHC’s Food Pantry Program is the largest in the region and last year distributed 178,000 bags of healthy groceries to people in need.

Project Synopsis: Mother Hubbard's Cupboard (MHC) requests \$9,695 to purchase 3 laptop computers, 3 iMac desktop computers, an iPad, and software to increase organizational efficiency. The laptop computers will be used by staff in our newest program, The Hub Garden Corps. In 2015, MHC received funding from Jack Hopkins to upgrade some of our office technology, and in 2017, we received additional funding from another source to upgrade the rest of our staff members’ computers. We have yet to upgrade the intern/volunteer computers. These computers are dated 2008, making them over 10 years old. These machines struggle to perform everyday functions. One computer is so dated it cannot connect to our cloud based storage. When using these old computers, one can expect to have wait patiently, as performing simple tasks takes a lot of time. We estimate we lose a total of 2 hours per week per most used computer waiting for programs and documents to open, save, and edit (approximately 8 hours/week, a total of \$416/month at \$13/hour). Estimates for upgrading/improving the current equipment fall in the range of \$400-\$500, roughly half the price of new equipment, which come with warranty, last longer, and provide more efficient operations than refurbished equipment.

Criteria:

Need – MHC provides emergency food, nutrition and gardening education, and makes gardening and kitchen tools available at no cost to patrons. Mother Hubbard's Cupboards programming addresses the needs outlined in both the Service Community Assessment of Needs (SCAN) and the Housing and Neighborhood Development Department’s (HAND) 2015-2019 Consolidated Plan. Specifically, MHC aligns with NA-50, Non-Housing Community Development Needs-91.215 (f) (Strategy 5, 1&3), which states HAND’s priority to “Provide funding to non-profit organizations that serve low income individuals/families with their basic emergency needs: food, shelter and health care.” And, “Provide funding to non-profit organizations that provide valuable services to improve quality of life.” (P.6) MHC’s programming develops the self-sustainability of community members who participate in educational services. Community members who participate in the Nutrition and Garden programs gain skills that reduce their dependency on emergency food providers. MHC also helps low-income community members access the “Essentials” as outlined in SCAN (section 7). From 2013-2019, demand for our services increased 95% and is expected to rise an additional 2% in 2019. This increase has required more time and money spent maintaining large necessities and our patron environment. Providing a safe, vibrant, and welcoming environment for patrons is a core tenet of MHC’s practices.

One-Time Investment - The purchase of new equipment will increase operational efficiency for many years to come. Much of our equipment is over 10 years old, and we anticipate the same durability of new equipment. We currently operate on Apple equipment, using Mac laptops and desktops. This equipment is not only durable, but has proven to be some of the most effective and efficient office-based operating systems. New computers will help us continue to expand our reach for years to come.

Fiscal Leveraging – MHC uses a combination of in-kind donations, volunteer support, and collaborative partnerships to maximize programming efficiency. Funding sources are equally diverse, ranging from national, regional, and local grants, individual donors and corporations. MHC receives discounted technology support from Tech Soup and we often use volunteers to help maintain the systems and set up program software needs, such as the Tool Share patron-accessible web page and the patron surveys. Not only will the requested equipment enhance MHC’s award winning programming, it will allow for quick, easy, and frequent communication with the donors, volunteers, and patrons that contribute to MHC.

Broad & Long-Lasting Effects – MHC’s programming would significantly benefit from a technology upgrade. Our programs have grown significantly since the move to the new facility in June 2013, and demand continues to grow. According to Feeding America, an estimated 25,260 food insecure people live in Monroe County. Monroe County’s food insecurity rate was 17.6% in 2017, higher than the national average of 12.9% (This is the most recent data available for our area). Food insecurity in adults has been linked to an increased risk of diabetes and chronic cardiovascular illnesses. Children who live in food insecure households have an increased likelihood of being sick, having growth problems, and being at risk for obesity.

Research suggests that nutrition education can be an effective instrument to addressing barriers to unhealthy eating. Gardening can also have a positive impact on participants’ physical, mental, and nutritional health. MHC provides the Monroe County’s largest food pantry, innovative garden and nutrition education programing, and the first food security tool share program of its kind.

MHC is a key contributor to the national dialogue on food security and we are often asked to participate in Webinars and present at national conferences. Updated technology would allow MHC to continue to be an innovative leader in food justice and anti-hunger work.

Outcome Indicators: New technology will save MHC time and money by increasing program efficiency. With new equipment, we assume the time lost waiting for slow computers will be eliminated. MHC projects a 2% increase in services in 2019. Time saved with new technology will allow MHC to focus our limited resources and staff time on meeting the increased need of the community.

Cost

Amount Requested (*in order of priority*)

| | |
|--|-------------------|
| 1. 1 iPad 3 iMac desktop computers 3 Macbook Air Laptops 6 Office for Macs through Tech Soup 1 Adobe suite through Tech Soup | \$9,695 |
| 2. 1 iPad 2 iMac desktop computers 2 Macbook Air laptops 4 Office for Macs through Tech Soup 1 Adobe suite through Tech Soup | \$6,636 |
| 3. | |
| 4. | |
| TOTAL REQUESTED | \$9,695.00 |
| Total Project Cost | \$9,695.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|----------|---------|--|-------------|
| 1999 | Granted | Refrigeration unit | \$1,029.00 |
| 2000-Oct | Granted | Establish a new southside food pantry in concert with the Community Kitchen & Perry Township Trustee | \$9,000.00 |
| 2002 | Granted | Fund a new nutrition education program | \$5,000.00 |
| 2006 | Granted | Pay for the purchase and installation of 1 2-door freezer unit and 1 2-door refrigeration unit | \$6,670.00 |
| 2008 | Granted | Provide bridge-funding to pay for salaries to operate the Mother Hubbard’s Cupboard community food pantry | \$24,000.00 |
| 2009 | Granted | Purchase a cargo van for the Food Pantry program | \$28,650.00 |
| 2011 | Granted | Purchase a van for the Garden & Nutrition Program | \$2,700.00 |
| 2012 | Granted | Freezer storage for food pantry program | \$7,285.71 |
| 2013 | Granted | Bridge funding to pay for salaries of Food Pantry Manager and Nutrition Education Coordinator for 26 weeks and salary of President and CEO for 18 weeks | \$23,815.00 |
| 2013 | Granted | To pay for staff salaries, printed materials, program supplies and scholarships for the <i>Birth, Lactation and Perinatal</i> program (Collaboration with Bloomington Area Birth Services) | \$1,960.00 |
| 2014 | Denied | Expansion of Garden and Nutrition Education | \$30,947.86 |
| 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, located at 1100 W. Allen Street, Bloomington, Indiana 47403 | \$4,002.00 |
| 2018 | Granted | Equipment Purchase | \$7,017.00 |

Staff Comments

Note that under the Elaboration of Criteria, computer equipment is considered operational funding. For that reason, the Committee might wish to inquire about the life expectancy of this equipment and how the agency intends to fund these on-going technology costs in the future.

In 2015, the Hopkins Committee granted MHC \$4,250 to purchase 4 staff laptops, 2 external CD drives and software.

18. MY SISTER’S CLOSET OF MONROE COUNTY

Ensuring Continued Client Services with the Help of the Cloud- \$21,635.95

City Residents Served: 975 (of 225)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 3 | 2 | 350+ |

Mission: 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 Synopsis: My Sister’s Closet, with the assistance of our full-time, volunteer Systems Analyst, and our team of Kelley interns, has been working diligently over the past year to create an online income stream by creating an online Ecwid store and an E-Bay account. Based on preliminary test sales results to date of both the Ecwid Store found on our website and our E-Bay account, we feel certain we can increase our organization’s overall thrift store sales by 25% annually if our project is managed properly and consistently. The ending result, will be our organization’s continued ability to provide free services to the clients living in poverty, who are making real efforts to become self-sufficient.

With the majority of the set-up completed for this project, the only thing left is to hire a staff member dedicated to managing and maintaining the project. (Without a consistent staff member in place, the project will not be able to continue.) My Sister’s Closet is requesting (first year, pilot) funds for an employee to act as an Online Sales coordinator to regularly manage our online sales presence.

My Sister’s Closet is respectfully requesting funding of \$25,000 towards this pilot project so we may fund the salary of an Online Sales Coordinator and an additional \$1,635.95 in supplies to launch it. Once established, we believe the online sales realized from this project will eventually fund this position itself as well as increase our overall store sales by 25%, approximately \$54,308/year in net sales (based on 2018 figures.).

Criteria:

Need – According to SCAN data, the women we serve fall into the following critical categories of need:

Education:

- “A person’s level of educational attainment is related to his or her level of employment and income.” (46); Those without high school diploma or GED are worse off in 2010 than 2013, and data suggests that the education threshold to enter higher-paying positions has grown over time (49)

Poverty rates:

- Poverty rate by educational attainment shows that 45.4% of those without a high school diploma are living in poverty (50);

Employment:

- Percentages of low-income households (under \$15k) looking for work was 48% (71), meaning that low-income mothers are part of the group that would most benefit from MSC services
- Percent of households who are having a problem finding a job that pays enough to meet the family’s basic needs has increased across all but the highest income levels, increasing the need for job training. (71/72)

Self-sufficiency:

- Based on the Self-Sufficiency Standard, women living below the median female income in Monroe county are in danger of falling below the self-sufficiency standard, particularly for single-led female families with a preschool child or with more than one child (86)

One-Time Investment - Our pilot project is designed to be self-funded once it is launched. This means, the need to additional funding after the first year will be unnecessary.

Fiscal Leveraging – Continued In-kind Donations: My Sister’s Closet is blessed with an abundance of in-kind donations in excellent condition. Many are sought after, sellable items. We will simply make further use of these wonderful, in-kind donations to sell online as continued and funding for this project. Currently, we have dedicated more than 200 items to get the online inventory started. Since our donations come in daily, we do not anticipate running out of a supply of online stock. Given that, it is reasonable to conclude that once the online stores have been launched successfully and supported with a trained coordinator, the sales will continue.

Staff Support: MSC currently works with a volunteer, full-time, Systems Analyst. This gentleman has dedicated his hours to supervising the new employee in this position. Additionally, we have 2 full time store staff members on this committee to make it successful.

Broad & Long-Lasting Effects – Clients served by My Sister’s Closet. These clients are: at-risk women living in poverty who have the desire to move closer to economic self-sufficiency. My Sister’s Closet provides essential career development tools, job training, mentoring, advocacy services, and professional interview attire to help them find employment and fit into culture of a new position and retain it. 85% of those we serve meet with job success in less than 6 weeks, and over 2200 women have been assisted to find jobs to date. The circumstances of these women include: Issues of homelessness (70%), domestic violence (65%), illness, divorce, job loss, recent incarceration or economic recovery. The majority lack the basic education, networks, and the necessary 21st Century skill sets required to compete in today’s job market without assistance. 92% of clients are residents of Bloomington.

Because this will allow us to additional funds to expand, continue, and increase the numbers of those we currently serve, this funding will assist us in creating a positive, social, and lasting economic outcomes for these clients and their families; thus allowing their children to access increases programming services and education opportunities, putting them on an upward, economic trajectory into multiple generations.

Outcome Indicators: The outcome indicators of our project’s success will be measured in 3 ways:

- 1) Regular, direct online sales designed to fund our new employee’s salary
- 2) Additional income dedicated towards funding our agency’s mission to serve low income women seeking self-sufficiency through gainful and meaningful employment. Goal is to eventually have the income allowing us to serve an additional 54 clients directly per year and an additional 200 indirect clients per year.
- 3) Continued, long-term sales and a new established customer/donor base as the reputation of our online presence (and our mission) expands. Goal is to reach 25% of current brick and mortar sales.
- 4) Increased public education about the needs of women and children living in poverty and at-risk circumstances. Our online presence will be designed to educate as well as sell, allowing customers to support our mission and to make meaningful contributions to those in need of economic assistance.

Cost

Amount Requested (*in order of priority*)

| | |
|--|--------------------|
| 1. 1st Year Salary of Online Sales Coordinator (If only partial funding is available, we will still use it.) | \$25,000 |
| 2. Pro Table Top Polaroid Photo Studio Kit – Already purchased, need to reimburse volunteer. | \$34.95 |
| 3. Backgrounds, sheeting of various colors; Background material @ \$80/roll in green, white, black; poster board | \$365 |
| 4. 16” x 16” Table Top Photo Photography Studio Lighting Light Tent Kit in a Box x 2 x \$58 | \$116 |
| 5. Mannequin and Human Model Stands (2) | \$160 |
| 6. Cost of Ecwid Monthly subscription paid through April 2019 | \$150 |
| 7. Light Fixtures – 3 @ \$25; Photography Bulbs @ \$45 x 3 | \$210 |
| 8. Packaging materials – Approximately \$50/month | \$600 |
| TOTAL REQUESTED | \$21,635.95 |
| Total Project Cost (Salary + Materials to photograph and ship items sold.) | \$26,635.95 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|--------|-------|--------|
|------|--------|-------|--------|

| | | | |
|-----------|---------|--|-------------|
| 2000-June | Denied | Wages, rent, credit card processing, parking stickers, & loan repayment | \$25,000.00 |
| 2001 | Granted | Purchase display, tagging, and laundry equipment for donations | \$1,130.00 |
| 2003 | Denied | Re-open retail & service facility | \$9,959.77 |
| 2007 | Granted | Purchase equipment for resale store of women's workforce clothing and a display case to inform the public about program | \$2,500.00 |
| 2008 | Denied | Supporting progress towards women's economic self-sufficiency | \$13,200.95 |
| 2009 | Granted | Pay rent & purchase boxes for storage facility | \$1,781.88 |
| 2011 | Denied | Maximized impact: addressing the needs of clothing voucher recipients w/ extended store hours | \$4,524.00 |
| 2013 | Denied | The green side of pink | \$13,516.00 |
| 2014 | Granted | Purchase an Apple iPad Air w/ wifi, a Square PoS System and an iPad-compatible projector | \$1,621.43 |
| 2015 | Granted | To pay the 1st year's salary to our executive director, for funding assistance for our Success Institute Programming, 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 Work Experience Training Pilot Program | \$17,550.00 |
| 2018 | Granted | Ready-2-Work program and technology equipment | \$9,490.00 |

Staff Comments

- The total ask is unclear: the application cover sheet indicates that the requested Hopkins amount is \$21,635.95 of a total project cost of \$26,635.95. However, based on MSC's funding priority chart and its Project budget, it appears that the requested Hopkins amount is \$26,635.95 and that the total project cost is \$34,383.95. The Committee may wish to confirm with MSC should MSC be invited to make a presentation.
- The priority ranking sheet and project budget indicate that MSC is asking for \$25,000 to fund the first year salary for the on-line coordinator. As the period for drawing down Hopkins funds is June-December 2019(with a possible extension into March of 2020), it is unclear how, if granted the funds, MSC will draw them down within the period of the grant. This may be a question the Committee wishes to ask the agency.
- MSC's lease ends in October 2019 and they are negotiating an extension. It appears that they are negotiating for an additional six months. Recall that the lease is not being renewed due to the expansion of the Convention Center. MSC writes that if the organization moves, this particular project "will be relocated elsewhere to continue."

19. NEW HOPE FOR FAMILIES

Playing, Learning, and Growing- \$21,384.80

City Residents Served: 70 (of 75)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 6 | 10 | 80 |

Mission: New Hope for Families helps families impacted by homelessness gain and maintain stable housing and provides stable, nationally accredited early childhood programming aimed at breaking the cycle of homelessness and poverty.

Project Synopsis: New Hope seeks a partnership with the Jack Hopkins Social Services Funding Committee to provide opportunities for playful learning and summer enrichment to up to 45 children aged six weeks to 18 years, most of whom are impacted by homelessness. School-aged children will participate in a hybrid school break program, sometimes attending programming in house at New Hope and sometimes attending camps in the community. Camps will be chosen by children according to their interests with guidance from parents and staff. We anticipate that children will select camps at The Boys and Girls Club, the YMCA, WonderLab, Kid City, Ivy Tech, Camp Dragonfly, and others. Infants, toddlers, and preschoolers will participate in playful learning activities at The Nest, under the supervision of talented and dedicated educators.

We seek an investment of \$21,384.80 to underwrite the cost of camp attendance and classroom equipment to support children’s school break and year-round learning.

Criteria:

Need – Both the SCAN and the Consolidated Plan encourage assistance to homeless families, which New Hope provides in the form of shelter, case management, programming for school-aged children, and nationally accredited early childhood care and education.

The Consolidated Plan specifically recognizes the need to fund agencies providing services to homeless families. As the only shelter serving intact homeless families regardless of composition or religious beliefs, New Hope is uniquely equipped to assist families on their path from homelessness to housing stability. By assisting families not only to find housing but to address the underlying causes of homelessness and through collaboration with other service providers, last year we were able to help more than 85% of families into sustainable housing. This is significantly higher than the state average of 52%.

The United Way’s SCAN 2012 acknowledges a strong and growing need for childcare and early childhood education opportunities, particularly among low-income families. New Hope’s early childhood center provides high-quality, full-day care and education, ensuring children enter kindergarten ready for success while simultaneously meeting parents’ needs. Children from low-income backgrounds often begin school with deficits, having heard perhaps 30 million fewer words than their middle-income counterparts¹. By providing excellent early childhood education, we are working to ensure they have a chance to be the members of their families to break the cycle of homelessness and poverty.

¹ Betty Hart and Todd R. Risley. “The Early Catastrophe.” 2004. Available at http://www.gsa.gov/graphics/pbs/The_Early_Catastrophe_30_Million_Word_Gap_by_Age_3.pdf

One-Time Investment - For six years, New Hope has operated an informal summer enrichment program for children served by our shelter program, The Roof at New Hope. Because of structural changes to our buildings, we do not anticipate having sufficient space to fully meet the need for summer care/programming for a period of two years. When the hospital moves, New Hope will relocate its services to a new site, where we anticipate constructing sufficient space to run summer programming for school-aged children. For the intervening two years, we plan to supplement the services we are able to provide with summer camps for school-aged children.

All materials and equipment have been selected for maximum life and many carry warranties of 10 or 20 years. We do not anticipate needing to replace these materials for several years.

Fiscal Leveraging – Have secured gifts to cover the cost of staffing for both school-aged summer break programming and year-round early childhood programming. The funding we are requesting is supplemental to that primary funding source.

In both programs, we rely on volunteers and interns as well as trained staff members. We have strong partnerships with the IU School of Education and the IU Undergraduate Career Services Office, which help us fill those volunteer and intern positions with qualified individuals.

We have additionally requested funds totaling \$4,500.

Broad & Long-Lasting Effects – We understand that children from low-income families are less likely to participate in summer enrichment activities (often because of cost barriers) and also suffer from summer learning loss at a far greater rate than children from middle-income families. Further, we know that these children are also far less likely to have access to arts and outdoor programming, while research indicates that at-risk children engaged in the arts and outdoor activities are likely to have better academic performance, higher career goals, and to be more engaged in their communities. Further, children impacted by homelessness are likely to struggle in areas of social and emotional development, and these enrichment activities are proven tools for addressing those challenges in a positive, proactive way, allowing children space to succeed and safe spaces to learn.

For early childhood, we know that the first five years are crucial to young children’s growth and development. By providing high quality materials for young learners, we are setting them up for early success in kindergarten and beyond.

Outcome Indicators:

1. Number of children who participate in summer enrichment programming.
2. Number of children who have access to high quality learning materials.
3. Number of children who increase kindergarten-readiness skills.

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| 1. Summer Enrichment Camp Scholarships (7 children/week X \$150/week X 11 weeks of summer) | \$11,550 |
| 2. Tablets (2 for early childhood classrooms, 2 for remote case management use; 4 X \$516) | \$2,064.96 |
| 3. Early Childhood Gross Motor Equipment | \$4,090.59 |
| 4. Early Childhood Art and Dramatic Play Equipment and Materials | \$3,679.25 |
| TOTAL REQUESTED | \$21,384.80 |
| Total Project Cost | \$33,484.80 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|--|-------------|
| 2011 | Granted | Construct a handicap accessible bathroom and laundry at W. 2 nd facility | \$14,000.00 |
| 2012 | Granted | The 301 Project | \$9,400.37 |
| 2013 | Granted | Pay for external audit, program materials for the <i>Love & Logic Program</i> and improvements to the shelter | \$8,025.00 |
| 2014 | Granted | Pay the salary of the full-time Director, wages of one or more interns, furnishings, appliances, materials and equipment; the purchase and installation of security system at 303 W. 2nd Street. | \$11,519.43 |
| 2015 | Granted | To renovate a property for use by our Children’s Program as a childcare site and family education center for the clients of New Hope for Families. | \$16,600.00 |
| 2016 | Granted | To purchase and install a corded telephone system linking New Hope offices; to purchase and install desktop and laptop computers; to purchase and install a security system monitor; to purchase and install a wireless network; to pay for hardwiring and set up of aforementioned technology; to purchase cribs, tables, child-sized chairs, tip-resistant shelving, a coat locker, outdoor sheds, and related equipment for New Hope’s Early Childhood Program. | \$13,382.00 |
| 2017 | Granted | To purchase outdoor educational items for the New Hope Early Child Development Center, a shed, and other shelter maintenance equipment. | \$12,091.00 |
| 2018 | Granted | 8-passenger vehicle | \$25,000.00 |

Staff Comments

Note that under the Elaboration of Criteria, scholarships are typically considered operational costs. Due to structural changes to the New Hope buildings, NH writes that it does not anticipate having sufficient space for a period of two years. If this is year one, NH should explain how it intends to fund this hybrid summer programming next year.

Day 1 Release Assistance Program- \$17,456

City Residents Served: 1,270 (of 2,541)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 1 | 5 | >50 |

Mission: New Leaf - New Life (NLNL) is a local volunteer-driven nonprofit whose mission is to support individuals during incarceration and in their transition back into our community. NLNL believes in supporting our neighbors that have been impacted by the criminal justice system. In this, we work to empower people towards self-advocacy; supporting one another in the spirit of solidarity not charity.

We provide social service programs and services to inmates in the Monroe County Correctional Center both during their time in jail and after release. Our Transition Support Center is focused on helping released inmates overcome the obstacles that they face in becoming productive, law-abiding citizens. The Transition Support Center has been enhanced this year by the hiring of a part-time volunteer coordinator. Our program in the jail this year has been enhanced by the addition of two life skills trainers and a social work trainer. The jail program provides a number of urgently needed services and is led by our President, Lindsey Badger who is also the chair of our program committee.

Project Synopsis: This project creates a viable pilot of Day-1 support for inmates released from the Monroe County Correctional Center (jail). It also modernizes NLNL computer equipment (used both by residents and staff) and, lastly, provides a key job support pilot for released inmates.

We are asking the grant committee to fund additional hours for existing part-time staff to build our Day-1 support capabilities. This requires substantial efforts both inside the jail and outside, but the largest effort will be on the outside. Ex-inmates (and support staff) require adequate computer equipment and software to learn computer skills, complete resumes, conduct job searches and effectively communicate. We are asking for three additional desktop computers and related equipment and software to enhance our capabilities. Lastly, we are requesting support for a pilot of employment assistance through the hire a part-time staff person to recruit formerly incarcerated individuals to work in different industries (e.g., carpentry, automotive, restaurant, etc.). This employment liaison will meet and get to know individuals who are recently released and looking for work in order to serve as an intermediary for unemployed ex-offenders and potential employers. To assist ex-offenders with the initial work transition, NLNL would provide loaner tools and equipment to support early work in kitchens, carpentry and construction as well as lawncare services.

Criteria:

Need – Recidivism in our jail is a big community problem. A study of the jail population reveals that the typical jail inmate has been there **five** times before. If it were not for recidivism, we would not have an overcrowded jail. And recidivism is expensive. It is estimated that the cost of apprehending an offender, prosecuting him, defending him, trying him, and incarcerating him is between 15 and 30 thousand dollars. And that doesn't include the social costs of his offenses before he is arrested and the costs of disrupting his or her family life.

This is complicated by the fact that the jail is primarily filled by those in poverty, those plagued with addictions and those facing mental health problems.

Everything we do, both in jail and after release, is aimed at improving the chances for success of our neighbors that have committed criminal offenses. We help them make the changes in their lives required to be productive citizens of our community.

One-Time Investment - The expansion of hours of part-time staff is intended to get the day-1 effort off of the ground and into the hands of volunteers that will operationally manage it. The expenses for computer equipment are a one-time investment. The hiring of a part-time employment liaison and the provision of key tools and equipment on a loaner basis are part of a short-term pilot to demonstrate the efficacy of providing key employment assistance through our Transition Support Center.

Fiscal Leveraging – There will be substantial leveraging of existing resources through this project. Two of the three part-time staff used in the project are already NLNL employees (the “outside” volunteer

coordinator and “inside” social work trainer) and need not be hired. The office space used will be our existing Transition Support Center and will not require the renting of additional space. NLNL extensively uses volunteers to conduct work and this will be especially so for the Release Assistance Program for Day-1. Volunteers will take over the bulk of the support of day-1 releasees after the program’s full implementation (after six month).

Broad & Long-Lasting Effects – Every person that we help to go straight is a long-term benefit to the community. He or she goes from being a burden to community resources to a contributing member of society. Given that we assist people at many stages of the recovery process—and may be involved in their situation for a relatively brief period of time—our services have the impact of moving individuals further in their journey to contributing to society. For some, our re-entry kits provide them the stability to start contemplating major life changes; for others, our assistance in transportation to work or work materials provides the necessary safety net to maintain and further their contributions.

Looking at this question another way, from the perspective of the organization’s long-lasting benefit: obtaining funding every year is a challenge, and going into the new year in decent shape makes the long run possible. We have a passion for what we do and we intend to be here for the long run, but most of those with the greatest passion for our mission lack the means to provide funding support. Your support, covering many day-to-day costs, makes the long run possible for us.

Outcome Indicators: See below for critical success factors (CSFs) and related key performance indicators (KPIs) –

CSF 1: Establish Sustainable Day-1 Program

- KPI 1A: Identified part-time staff conduct day-1 outside and inside volunteer training
- KPI 1B: Written procedures are completed for program’s continued operations
- KPI 1C: 75% of jail releasees are met upon day-1 release and escorted to obtain resources

CSF 2: Equipment Modernization

- KPI 2A: All identified equipment and software is procured and installed

CSF 3: Completion of Pilot of Employment Assistance

- KPI 3A: Employment liaison hired
- KPI 3B: Loaner system for tools and equipment created and inventory purchased
- KPI 3C: Participants (75%) in Employment Assistance Program Complete Program Questionnaire

Cost

Amount Requested (*in order of priority*)

| | |
|--|--------------------|
| 1. Two part-time staff (one outside and the other inside the jail) that will develop training for volunteers that will take over for mentoring and assisting offenders on day-1 (and in preparation for day-1 of release). Initially, some of the mentoring and assisting of offenders will be done by these paid staff as procedures are developed and volunteers are prepared. | \$7,774 |
| 2. NLNL has a collection of old, second-hand PC computer equipment. Three new mid-level desktop computers with standard peripherals will be purchased as will a new laser printer with replacement cartridges. A subscription to Office 365 software will be purchased for all PCs for a year to support contemporary office automation usage by clients and staff. | \$4,316 |
| 3. A part-time staff person (employment liaison) will be hired for the six-month pilot. Selected tools and equipment will be provided on a loaner basis for key local industries of food service, carpentry, construction and lawn service. | \$5,366 |
| 4. | |
| TOTAL REQUESTED | \$17,456.00 |

Total Project Cost**\$36,475.00****Past SSF Funding**

| Year | Status | Title | Amount |
|------|-----------|--|-------------|
| 2005 | Denied | Personnel, office, office supplies | \$10,000.00 |
| 2006 | Denied | Inmate Transition Program | \$23,000.00 |
| 2007 | Denied | Families or child of incarcerated parents | \$14,100.00 |
| 2008 | Withdrawn | Hal Taylor House | \$6,270.00 |
| 2009 | Granted | Therapeutic Jail & Reentry Programs (bridge funding) | \$14,577.96 |
| 2012 | Granted | Funding part-time facility manager for transition program | \$9,285.71 |
| 2014 | Granted | To pay for salaries, benefits, and supplies for all New Leaf/New Life programs | \$14,577.96 |
| 2015 | Granted | To fund a pilot project to provide an additional 20 hours/week of much needed casework capacity at the Transition Support Center | \$6,000.00 |
| 2018 | Granted | New Leaf- New Life services | \$11,229.00 |

Staff Comments

Approximately ½ of this project's clients are anticipated to be City residents.

NL-NL asks for funds for both staff and computer equipment. While the agency explains how it will fund the staff component in future years (via volunteer), the agency does not explain how it will fund on-going need for the associated computer equipment.

Not clear what relationship the employment liaison will have with agencies such as WorkOne and/or the type of expertise needed for such a position.

Note that NL-NL is asking for a total of 30 additional staff hours for extending hours of two existing PT staff and adding an employment liaison. While it is clear that NL-NL plans to turn over the Day 1 duties to volunteers after the pilot, it is unclear if the employment liaison is intended to remain a staffed position or if it too will become volunteer. If intended to remain a staff position, the agency should explain how it intends to fund this position in the future.

Vehicle Assistance Program- \$10,000

City Residents Served: 25-30 households (of 35-40 households)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~80 |

Mission: Mission Statement of the Vehicle Assistance Program:

The Society of St. Vincent de Paul is an all-volunteer organization that serves the poor and unfortunate in Bloomington and Monroe County, Indiana. We are seeking a solution to help move people out of poverty, and safe transportation is one of the key necessities to achieve this. Our Program makes repairs in order to maintain a safe and reliable vehicle necessary for clients and their families.

Clients learn about us from handouts at Township Trustees, Monroe County United Ministries, Salvation Army, 911, church bulletins, and agency direct referrals.

We require no faith-based test; we are open to all.

Project Synopsis: Our project involves 2 goals: We are requesting \$10,000 to help clients make repairs in order to maintain a safe and reliable vehicle vital to daily life and needs. Our partner, Joe’s Garage, provides quality repairs at a reduced price at 30-50 percent. Effectiveness of the program is measured by the reliability of the repairs made with new parts that insures long term driving reliability.

Our second goal is to complete an assessment of the program for all clients assisted under this grant to measure how and why this is a valuable program with the plan to ultimately establish it as a sustainable program. The assessment will include follow-up interviews with the families to see if the vehicle repairs have maintained the ability to meet their needs.

Our strategy includes surveying clients assisted through this grant funding. Committee members have already identified post-assistance questions to ask our clients. The outcome will be a report from the data gathered. After we measure the effect of this assistance, the report will help us improve our assistance, quantify its impact, identify other partners, and target future funding sources. The report will first be evaluated by the committee, then the entire local St. Vincent de Paul society. We plan to send our representatives to other local organizations to invite them to participate in this program.

Criteria:

Need – Addressing the SCAN document on Transportation:

“Certain policies and guidelines present barriers to providing families needing assistance; these include (the fact that) Township Trustees are prohibited from including the cost of maintaining a car in determining eligibility for income assistance according to state law; this rule prevents some individuals from qualifying.”

We are the only non-profit in Monroe County with an established program for vehicle repair for our local, low-income population. Our vehicle assistance program helps people who need repairs to their automobile. Transportation is one of the key necessities to keep families out of poverty. Many people with low incomes have non-functioning vehicles, yet they do not live or work near a bus route; or, if on a route, the buses do not run late at night or on Sundays when our clients must work. Our goal is to help them make repairs to maintain a safe and reliable vehicle necessary for clients to go to work or find a job, get to a doctor appointment, shop for necessities, or get children to school or daycare.

One-Time Investment - SVdP is asking for this grant pursuant to the broad allowance for operational funds this year. In the future, the Vehicle Assistance Program will be funded through donation, grants, and fund raisers. Although we have an annual Hog Roast Fund-Raiser (this June will be our 9th) most of that money is used to pay clients’ rent, deposits, med co-pays, and utility bills, not specific programs. We will develop smaller fund-raisers, to be held 2 times per year.

Fiscal Leveraging – We are an all-volunteer organization; there is no paid staff. We have approximately 80 volunteers, some who spend 20-30 hours per week assisting people in need.

Joe’s Garage is supportive of our mission of helping individuals who would otherwise be unable to have their vehicles repaired. Joe’s Garage provides honest assessment and repair of the vehicle at a much

lower cost than dealer or franchised shops enabling the program to help nearly twice the number of families. 100 percent of the grant funding will go to repair of vehicles.

Broad & Long-Lasting Effects – Once their vehicle is repaired, our clients can maintain or seek employment or use their vehicle for transportation to vital services such as health care for themselves and their families. This is an on-going program. The range of repair has been between \$200 - \$400. With \$10,000 in grant funds, we can help approximately 30-40 families during the course of the grant year. Our program is unique in Monroe County. There is no other agency providing this kind of assistance.

Outcome Indicators: We have developed an assessment to measure how and why this is a valuable program with the plan to see if the vehicle repairs have maintained the ability to meet their needs. Our strategy includes surveying clients helped through this grant. The outcome will be a report from the data gathered. After we measure the effect of this program, the report will help us improve our assistance, quantify its impact, identify other partners, and target future funding sources.

(See Attachment on Assessment of Program)

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| 1. Vehicle Assistance Program – 30-40 vehicles would be repaired. If funding is less than requested, fewer autos will be able to be repaired. | \$10,000 |
| 2. 25 – 30 vehicles would be repaired. | \$7,500 |
| 3. 15 – 20 vehicles would be repaired. | \$5,000 |
| 4. | |
| TOTAL REQUESTED | \$10,000.00 |
| Total Project Cost | \$10,000.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|--------|---|-------------|
| 2005 | Denied | SVDP Furniture distribution and resale center | \$29,000.00 |
| 2008 | Denied | Replace truck engine | \$4,847.74 |

Staff Comments

As the requested \$10,000 has the potential to fund repairs for slightly more households than the City households anticipated to be funded by this initiative, the Committee might want to seek assurance that any granted funds will only be used to assist City residents.

22. SHALOM COMMUNITY CENTER, INC

Project name- \$12,502.00

City Residents Served: 2,500 (of 2,500)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|----------------|
| 17 | 12 | 1494 (in 2018) |

Mission: Shalom Community Center is dedicated to aiding and empowering people experiencing hunger, homelessness, and poverty. Founded in 2000 in response to a growing community concern about the needs of people without homes, Shalom has grown rapidly these past 18 years to become the most comprehensive response to extreme poverty, most notably homelessness, in Monroe County. Shalom provides daytime and overnight shelter, hunger relief, permanent supportive housing, rapid re-housing, social services and case management, employment support, street outreach, eviction prevention, prescription and health care assistance, 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 Synopsis: Shalom Community Center is requesting \$12,502 for six water-efficient, power-flush toilets, four washers and dryers, and one freezer to continue or improve our emergency and life essential services.

The six workplace toilets will be high efficiency, reducing water use by 20% per flush. In addition, they will provide a power flush. Due to heavy and sometimes inappropriate use of our toilets, plunging emergencies are a daily feature at Shalom. The improved toilets should reduce “plunging events” and hopefully also reduce calls for plumbing support, which will increase access, reduce costs, and be kinder to our staff.

The four commercial-grade Speed Queen washers and dryers will replace the old ones, which have started to falter at such a rate that our repair company suggested replacing them. They will allow Shalom to continue to provide free laundry services, where our guests washed more than 4,300 loads last year.

Lastly, the commercial freezer will replace a freezer in our kitchen that died recently due to replacement parts no longer being available. Freezer capacity is essential to our meals program, which served more than 79,000 meals last year.

Criteria:

Need – The 2015-19 Consolidated Plan describes two of its priority needs as providing “funding to non-profit organizations that serve low income individuals/families with their basic emergency needs: food, shelter and health care,” and providing “funding to non-profit organizations that provide a safety net for community members in need.”

The Plan also describes its Anti-Poverty Strategy as providing “access to emergency assistance by providing funding through CDBG and the Jack Hopkins Council Social Service Grant Program to agencies that provide said services.”

On page ninety-six of the Consolidated Plan, it even lists the work of Shalom as an essential part of the City’s service delivery system for people experiencing homelessness. It reads, “In Bloomington, often individuals/families who are homeless or at risk of homelessness learn about valuable services at the Shalom Community Center... The Shalom Community Center is a daytime resource center for people who are living in poverty and experiencing its ultimate expressions: hunger, homelessness, and a lack of access to basic life necessities.”

Because of our central work as a resource center for people experiencing extreme poverty and the essential need for laundry, restrooms, and meals, this project will help address a significant need in our community.

One-Time Investment - As a capital expenditure, it would be a one-time expense.

Fiscal Leveraging – Our staff and volunteers are in constant engagement with our restrooms, washer and dryers, and kitchen. Our annual budget for the operation of our day shelter is \$555,502.33. We have ~1500 volunteers per year.

Broad & Long-Lasting Effects – Restrooms, laundry, and meals are life essentials for all of us. As the second largest meal provider for people in poverty in the City, Shalom provided 79,084 meals in 2018. As the primary location for free washers and dryers, guests of the Center were able to clean and dry 4,362 loads of laundry last year. While we have no way to measure the number of people who use our restrooms, we see 200-300 people per day in our Center and approximately 2500 people per year. Shalom has one of the very few public restrooms available to people experiencing hunger, homelessness, and poverty. The toilets will also help us reduce our water usage. Through your funding of these capital expenses, all of these programs will be able to continue into the future.

Outcome Indicators: For the washers and dryers, we can present you with number of loads of laundry performed over a set period of time of your choosing. For the freezer, we can share the number of meals served. For the toilets, it's more complicated to measure as we don't count people who come through the front door and certainly don't monitor bathroom use. We can report on our water usage and hopefully demonstrate a small change in water use due to the more efficient toilets. We can also report the reduction (hopefully) in the number of plunging events, which currently average ~1 per day. (Yes, I do hope this gives you a little giggle).

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| 1. Six American Standard Cadet Pro Toilets, including installation | \$2,270 |
| 2. Four Speed Queen Commercial Washers and Dryers, including installation | \$6,632 |
| 3. One True 27" Single Section Reach-In Freezer, including installation | \$3,600 |
| 4. | |
| TOTAL REQUESTED | \$12,502.00 |
| Total Project Cost | \$12,502.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|-----------|--|-------------|
| 2003 | Granted | Pay for 6 new phone sets & install 3 new phone lines to E. 4 th facility | \$1,900.00 |
| 2004 | Granted | Pay for part-time food services coordinator to expand breakfast & lunch program, as well as train & provide experience | \$5,500.00 |
| 2005 | Granted | Vertical lift for Shalom Center annex at S. Washington | \$9,000.00 |
| 2006 | Granted | Purchase a communication system & technology system network that includes both server & software at S. Washington | \$7,809.18 |
| 2007 | Granted | Purchase & install a 3-compartment deep wells ink and convection oven for E. 4 th | \$5,450.00 |
| 2008 | Granted | Purchase & install food service equipment for weekday food program | \$11,080.00 |
| 2009 | Granted | Purchase food as well as kitchen & misc. supplies | \$18,000.00 |
| 2010 | Withdrawn | Emergency Hunger Relief | \$9,300.00 |
| 2011 | Granted | Pay for renovations to expand facility on S. Walnut | \$19,000.00 |
| 2012 | Granted | Safer & savvy Shalom | \$15,794.00 |
| 2013 | Granted | Crawford Homes Start-up | \$20,900.00 |
| 2014 | Granted | Pay for a server, laptops and accessories, computer upgrades, software, guest wi-fi, dual monitors, and installation costs. | \$12,996.14 |
| 2015 | Granted | To apply an epoxy/polyurethane system to the bare concrete floors at the Shalom Center. | \$5,900.00 |
| 2015 | Granted | To purchase 4 washers, dryers, and PureWash systems to allow us to continue to provide laundry services for our homeless and impoverished clients. (Collaboration with IFWS) | \$6,800.00 |
| 2016 | Granted | To pay for two months of operational funding for emergency, overnight sheltering at A Friend's Place, located at 9 17/919 S. Rogers Street, Bloomington, Indiana | \$25,000.00 |
| 2017 | Granted | To purchase Chromebook computers and internet access for residents of Crawford I, Crawford II, and Crawford's scattered sites and to provide staff support for the same as part of the Crawford Homes Technology Access Project. (Collaboration with LIFE Designs) | \$27,949.00 |
| 2018 | Granted | Phone system | \$13,740.00 |

Staff Comments

Note that Shalom was granted \$6,800 in 2015 to purchase 4 washers, dryers, and a PureWash system as part of a collaborative project with the Interfaith Winter Shelter. Given the level of use, at the time of the grant, the expected lifespan of the commercial machines was anticipated to be around 4-5 years.

The Committee might wish to inquiry about the life expectancy of the washers, dryers, toilets, and the freezer.

23. SOUTH CENTRAL INDIANA HOUSING OPPORTUNITIES

Executive Director Salary (bridge)- \$19,550.00

City Residents Served: 5,278 (of 6,597)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| | | |

Mission: South Central Indiana Housing Opportunities is dedicated to expanding housing options for low and moderate-income households in Bloomington, Monroe County, and Brown, Greene, Lawrence, Owen, and Morgan Counties in South Central Indiana. Our vision is to build sustainable and inclusive communities that offer diverse housing options for people of all income levels, ages, and abilities.

Project Synopsis: SCIHO is requesting \$19,550 from the Jack Hopkins Social Services Funding Committee to serve as bridge funding for the salary of the Executive Director while we complete the construction of Phase 1 of Switchyard Apartments, a multifamily building of all affordable apartments next to the City’s new Switchyard Park. The Switchyard Apartment budget includes a developer fee that is an important source of revenue for us. However, SCIHO can only request disbursement of these funds based on the verified to-date completion of construction. The current construction timeline is May 2019 - January 2020. Bridge funding from the JHSSF grant for the Executive Director’s salary will provide key interim support to sustain and grow SCIHO’s housing programs for low- and moderate-income Bloomington residents and leverage other operational funds.

Criteria:

Need – SCIHO’s mission-based programs are designed to support housing needs for low- and moderate-income households and address a widely recognized housing crisis in Bloomington.

| RISING COST OF HOUSING FOR RENTERS IN THE CITY OF BLOOMINGTON | | |
|---|----------------------------------|--|
| | 2007-2011 | 2011-2015 |
| Cost-Burdened Households: >30% of income spent on housing | 39% | 61% |
| Extremely Cost-Burdened Households: >50% of income spent on housing | 29% | 42% |
| Source | HAND 2015-2019 Consolidated Plan | U.S. Housing and Urban Development Comprehensive Housing Affordability Strategy data |

In the City of Bloomington, 83% of renter households are low-income (16,815 out of 20,030), and 36% of homeowners are low-income (3,635 out of 10,200). (Source: *U.S. Housing and Urban Development Comprehensive Housing Affordability Strategy* data, 2011-2015)

According to the Service Community Assessment of Needs (SCAN) for Monroe County, Indiana, 13% of homeowners surveyed in 2010 indicated a major problem having enough money to pay their rent or mortgage.

The shortage of affordable housing in the City of Bloomington is also well-documented in sources such as the City’s Comprehensive Master Plan adopted in 2018, and reflected in the affordable housing incentives in the current revision of the Unified Development Ordinance.

The Consolidated Plan’s *Strategy 5: Public Service Assistance* (p.3) calls for funding to non-profit organizations that provide a safety net for community members in need, as well as funding valuable services to improve quality of life.

One-Time Investment - SCIHO is pleased to be developing Switchyard Apartments as a means to increase the city’s stock of permanently affordable housing supply. However, the timeline for the financing and construction of Phase 1 has taken several months longer than originally projected. (*See details under the “Other Comments” section, below)

Especially as a newer local nonprofit, we do not have reserves to draw on for operations when the expected income from the project required additional time. The bridge funding from the JHSSF grant will

help us manage a crucial gap in our revenues during the construction period for Phase 1 of Switchyard Apartments.

Fiscal Leveraging – The bridge funding from the JHSSF grant for the Executive Director’s salary will provide key stability to sustain and grow SCIHO’s program areas and accordingly, leverage other operational funds. Current and upcoming programs include:

- **Phase 2 of the Switchyard Apartments project:** assembling the financing to launch this next stage of the project.
- **Add to our affordable housing pipeline:** scout out new prospects for new construction or rehabilitation.
- **Housing 4Hoosiers Program:** improve the website, distribute the “Renting in Indiana” handbook, organize the semi-annual Tenant/Landlord Education Series
- **Housing Navigators program:** train community volunteers to provide renters with housing guidance and improve their housing stability
- **Tenant Assistance Table:** participate in a new collaborative eviction-avoidance program at the Monroe County Justice Building
- **Plan for an inaugural annual fundraising event**

Broad & Long-Lasting Effects – Bloomington’s high quality of life makes it an attractive, desirable place to live. Yet, these same qualities also have contributed to a high-cost housing market where low-and moderate-income households increasingly find it difficult to have safe and stable housing that is also affordable.

South Central Indiana Housing Opportunities’ mission-based programs are designed to address these housing challenges and to build sustainable and inclusive communities.

Outcome Indicators: Anticipated Outcomes for SCIHO in 2019:

- 12 residents, prepared to move into Phase 1 of Switchyard Apartments including at least 4 people with disabilities.
- 5,000 users of the Housing4Hoosiers.org website
- 115 attendees at the semi-annual Tenant/Landlord Education Series
- 350 copies distributed of “Renting in Indiana: A Handbook for Tenants and Landlords”
- 1,120 direct technical assistance to low-income renters via the Housing Navigators, Tenant Assistance Table, and other outreach efforts.

Cost

Amount Requested (*in order of priority*)

| | |
|--|--------------------|
| 1. 13 weeks of Executive Director @ full-time salary | \$19,550.00 |
| 2. 13 weeks of Executive Director @ ¾ time salary | \$14,662.00 |
| 3. 13 weeks of Executive Director @ half-time salary | \$9,775.00 |
| 4. | |
| TOTAL REQUESTED | \$19,550.00 |
| Total Project Cost | \$39,100.00 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|--------|-------|--------|
| | | | |

Staff Comments

This is a request for bridge funding for the Exec. Director’s salary until SCHIO receives the developer fee upon completion of the Switchyard Apartments (est. 2020). As the developer fee is not a source of funding that has been lost (rather one the organization did not receive as soon as they anticipated) this request might also be framed as one under the broader allowance for requests for operational funds, rather than a bridge. While the full payment of the developer fee is cited as the other side of the bridge, it is unclear how long this fee is intended to sustain the salary of the Exec. Director.

Athlete Expansion Support- \$11,563.16

City Residents Served: 180-200 (of 200-250)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~100 |

Mission: In cooperation with others in the community, Special Olympics Indiana Monroe County (SOIMC) offers year-round sports training and athletic competition for children (ages 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. 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 Synopsis:

ASK:

SOIMC seeks a one-time investment of \$11,563.16 to purchase equipment and provide Team expansions to support the growing number of athletes requesting to participate on sports teams as well as provide functional equipment and uniforms.

NEED:

Providing an accessible platform for individuals with disabilities within the City is vital for their continuous physical and mental stimulation. SOIMC provides multiple physical screenings as well as nutritional support to athletes to enhance health education and promote sustainable lifestyles. Current available funds do not provide the necessary funding to expand teams to allow for the steady influx of athletes SOIMC has encountered over the last three years (~14.2% per year), therefore creating a self-limiting scenario. It is increasingly important to maintain this support platform by expanding the Teams available for participation as well as quality equipment to continue to enhance the health and experience of those with disabilities in Bloomington.

BENEFITS:

The immediate benefits of this Expansion are:

1. Increase number of athletes are allowed to participate in local, regional, and state events as available Team spots are expanded.
2. Increase potential performance as available equipment is improved and expanded to support the growing Teams.
3. Results are realized as soon as the next sports season is available.
4. Increase sense of value and positivity within individuals regarding their community as new equipment and uniforms replace broken parts.
5. Improve athlete compliance and long-term involvement within the community, as athletes will not be turned away due to low availability of Team spots.

Criteria:

Need – SOURCE: According to SCAN 2012, an increasing number of children and young adults are being placed on waitlists for programs that support individuals with disabilities. The study indicated that nearly a third of households in Monroe reported having difficulties receiving services for children with learning disabilities. While an average rate of disability is difficult to depict, Monroe County residents indicated a disability rate of 13% for those aged 5 or older.

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.

NEED: Both SCAN and HAND’s 2015-2019 Consolidated Plan note that providing opportunities for individuals with disabilities to interact within their community and 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 and long-term interactions and support.

One-Time Investment - SOIMC seeks a one-time investment from the JHSSF to purchase equipment and provide Team expansions 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 with 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 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.

Fiscal Leveraging – This project leverages funds in several ways.

Other Funds:

1. The Knights of Columbus have provided a funding discount for the Summer Games in the amount of \$3,185.00.
2. Various fundraisers and contributions have provided a value of \$12,938.07 for Team Expansions and game registrations as of 31-DEC-2018.

In-kind:

1. Facilities for major sporting events are provided by various entities within the City including but not limited to Bloomington High School South, Classic Lanes Bowling, and Indiana University.

Volunteers:

1. All coaching, staffing, support, and County organization is volunteer-based.

Broad & Long-Lasting Effects – As the number of residents with disabilities seeking social interaction 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 also supporting self-growth and emotional connection.

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 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: This funding request is for equipment to last indefinitely as well as Team expansions to last 12 months. The outcome indicators:

- In the course of 12 months, 80% of sporting teams will have the required equipment to allow athletes to participate at a high level of competition previously not acquired due to outdated and/or broken equipment.
- In the course of 12 months, we will see an increase in the number of athletes served near the previous growth ratio of 14.2%.
- In the course of 12 months, we will see an increase in the number of athletes participating for Monroe County at the State Indoor Games, as well as Bowling League.

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| 1. Sporting Uniforms | \$3,909.40 |
| 2. Bowling Ramps | \$474.95 |
| 3. Gymnastic Supplies | \$294.90 |
| 4. Sports Equipment | \$3,276.11 |
| 5. Team Expansions (less leveraged funds) | \$3,607.80 |
| TOTAL REQUESTED | \$11,563.16 |
| Total Project Cost | \$27,686.23 |

Past SSF Funding -- None

Staff Comments

- Note that while the applicant indicates that theirs is not a request for operational funds, approximately 30% (\$3,607.80) of their request is for “team expansions” including fees and travel and lodging for the Summer Games. Under the Elaboration of Criteria, these costs are considered operational. Similarly, if the uniforms requested are given to the athlete, rather than handed down to other successor athletes, that might also be considered operational, a subsidy. Applicant should speak to its plan for funding these costs in the future.
- It is unclear how frequently the requested equipment would be used.

25. VOLUNTEERS IN MEDICINE OF MONROE COUNTY

Page Location 515

Ensuring Access to Urgent Medical Care for Uninsured People- \$24,800.00

City Residents Served: 800 (of 1,000)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 8 | 6 | 65 |

Mission: In cooperation with others in the community, Volunteers in Medicine provides the following services without cost to the medically underserved in Monroe and Owen counties:

- Easily accessible, high quality primary and preventive health care
- Treatment for both acute and chronic conditions
- Health education that empowers individuals to take responsibility for their own well-being

Project Synopsis: Volunteers in Medicine respectfully requests \$24,800 to help fund the clinic's emergency Walk-In services. The VIM Walk-In clinic gives uninsured people immediate access to medical care for urgent issues. As well as an alternative to visiting the emergency room (ER).

Since people often wait until they are sick to seek medical care, frequently new VIM patients arrive only when they need immediate medical attention. Because of our Walk-In Clinic we are able to have them enroll in VIM services, and at the same time, also see a practitioner for their urgent concern. The purpose of this request fits one of the high priority areas for JHSS funding: emergency medical care.

The benefits of VIM's walk-in clinic are:

1. **Provide on demand care** – No appointment is necessary; the individual doesn't have to wait for a provider's schedule to open up to be seen for an acute urgent issue.
2. **Quality care - Walk-in clinicians** specialize in treating minor emergencies and are trained to promptly treat urgent medical situations before they become life-threatening
3. **Saves the ER for emergencies** – When people use the VIM walk-in clinic, instead of seeking care at the ER, it frees up the ER to treat life-threatening emergencies.
4. **More efficient use of community resources** – The cost for VIM to provide walk-in services is much less than the cost of providing non-urgent care through emergency room services.
5. **Free to VIM patients** – More importantly, the service is free to the patient.

Criteria:

Need – The 2012 SCAN survey reported that despite the array of medical services offered locally our region still has a shortage of primary care clinicians. The report also notes that “(T)he waits for appointment times can be excessive.” Further, according to Brian Shockney, President/ CEO IUHB Hospital, 62% of the visits to the emergency room in 2018 were for non-emergent reasons (Email 2/21/2019).

One would have hoped that in the 7 years since the SCAN was conducted more providers would have been recruited to this area and wait times would have decreased. Unfortunately, this is not the case. In fact, new patient appointments are now being scheduled at the Southern IN Physician offices for the end of July and into August! At the same time, 14% of all patient visits to VIM in 2018 were walk-ins – 1,562 visits. Moreover, uninsured people tend to wait until they are very sick before seeking medical care. When they finally come to VIM, because of our walk-in clinic, we are able to have them enroll in VIM services and during the same visit also see a walk-in provider. Patients are able to get the treatment they need, when they need it, and avoid an expensive visit to the emergency room.

One-Time Investment - This funding request is pursuant to the 2019 allowance for operational funding.

For the first time last year, VIM ended the year with a funding deficit. We project that 2019 will be even worse and are seeking funding from numerous sources to assist with the operational deficit. Walk-in services are among those that the clinic cannot do without; moreover, free urgent medical attention is a service that the community cannot do without! (plan for future funding addressed in detail below)

Fiscal Leveraging – Nurse Intake Volunteers: During 2018, 922 volunteer hours (RNs and others), valued at \$19,267, were used to assist with triage and intake of walk-in patients. This level of support is also expected in 2019 which allows our walk-in provider to focus on the medical care of her patients.

Cash: The VIM budget will pay for the rest of the walk-in NPs annual salary as, thus far, I have been unable to find additional funding to leverage.

The Jack Hopkins Social Services funding seems to be the ONLY funding that allows operational requests – for which I am immensely grateful.

Broad & Long-Lasting Effects – The provision of walk-in services at the VIM free clinic has many long-term benefits for the community:

1. **Reduces non-emergent visits to the ER:** The large number of non-emergent visits to the emergency room is hugely expensive. The VIM walk-in clinic is an alternative to the ER. Unfortunately, because VIM doesn't have after hours emergency services, people are still forced to use the ER. We hope to alleviate this in the future.
2. **Provides easy access to care:** The VIM Walk-In clinic is often the entry point for long-term care for people with serious medical conditions. Many people only seek medical care when they have become too sick to wait any longer.
3. **Coincides with insurance enrollment:** Any U.S. citizen that comes to VIM is helped to enroll in an appropriate insurance plan, thus enabling the person to gain entry into the broader healthcare system. The individual is seen in walk-in and assisted with their insurance enrollment in the same visit.
4. **Offers culturally competent care:** The VIM walk-in nurse practitioner is fully bilingual in Spanish – a great help to our Hispanic patients.

VIM, by its very existence “has broad and long-lasting benefits for our community” (SCAN). We are the only source of free urgent care in Bloomington.

Outcome Indicators:

1. Number of people seen in the Walk-in clinic
2. Number of patient visits to the Walk-In clinic during the 6-month period (June-December 2019) and compared to same period in 2018.
3. Case examples of how the walk-in appointment was critical to the individual's health and well-being.

We will also try to report (if we can through the EMR):

4. Number of people enrolled in insurance that initially came to Walk-in.
5. Number of people seen in walk-in that were sent to the ER for a life-threatening emergency.

Cost

Amount Requested (in order of priority)

| | |
|--|-----------------------------------|
| <p>1. Funding to offset approximately 6 months of the Nurse Practitioner salary and fringe benefit costs to staff the Walk-In Clinic. (fringe benefit costs are 7.65% of base salary)</p> <ul style="list-style-type: none"> • Salary • Fringe <p>Rationale: Salary was determined by the formula: \$48/hour * 20 hrs/wk * 24 wks = \$23,040</p> <p>Fringe is 7.65%</p> | <p>\$23,040.00 \$1,765.56</p> |
| <p>2. Whatever funding we receive from the JHSS grant will offset part of the budget deficit. The executive director is seeking funding from as many sources as possible to mitigate the projected deficit. Rationale for determining this specific amount is detailed below.</p> | |

| | |
|---------------------------|--------------------|
| 3. | |
| 4. | |
| TOTAL REQUESTED | \$24,800.00 |
| Total Project Cost | \$53,741.88 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|--|-------------|
| 2007 | Granted | To purchase computer equipment, commercial grade multi-function printer, subscription to messaging system, and IT network and support for a new, community health care clinic for uninsured residents of Monroe and Owen counties. | \$32,250.00 |
| 2008 | Granted | To purchase computer equipment for three clinical work stations, a monitor and software to improve delivery and lower the cost of medical services. | \$10,725 |
| 2010 | Granted | To purchase a Kirby Lester Tablet Counter to be housed at the facility located at 811 West 2nd Street. | \$5,880.00 |
| 2011 | Granted | To purchase scanners to improve patient assistance. | \$2,700.00 |
| 2012 | Granted | Promoting high quality care with high quality equipment | \$7,141.69 |
| 2013 | Granted | To purchase and automated medication refill system, including the Tele-Fill and Attendant-Rx program. | \$7,545.00 |
| 2014 | Granted | To pay for the following components of the Supporting Care for Uninsured Individuals with Diabetes: an A1C Analyzer, a pilot study of Fenofibrate for 20 diabetic patients with triglycerides > 400, and an electronic vital signs monitor and mobile stand. | \$9,283.22 |
| 2015 | Granted | To purchase the Alere Cholestech System in order to offer patients onsite fasting lipid testing for the screening of risk factors for cardiovascular disease. | \$5,700.00 |
| 2016 | Granted | To pay for salaries of dentists, dental assistants, and dental hygienists in interest of the expansion of Volunteers in Medicine's dental services. | \$21,500.00 |
| 2017 | Granted | To pay for the following in the interest of implementing an Electronic Medical Records (EMR) system: computers, data migration, license fee, fax server, film x-ray scanner, operating system software and installation, consulting, etc. | \$24,830.00 |
| 2018 | Granted | Diagnostic labs and Imaging | \$26,000.00 |

Staff Comments

- While the reason for V.I.M.'s funding deficit is implied (shortage of primary care physicians in Bloomington; increased demand for services), the reasons are not made explicit. The Committee may wish to inquire. In 2018, V.I.M.'s operating deficit was \$71,000 and in 2019 it is expected to be higher.

26. WHEELER MISSION

Increased safety and security for the most vulnerable- \$18,226.48

City Residents Served: 1,100 (of 1,100)

Employees:

| Full-Time | Part-Time | Volunteers |
|----------------------------|--------------------------|--------------------------------|
| 25 (125 including Indy) | 3 (33 including Indy) | 236 (8,000+ including Indy) |

Mission: Wheeler’s mission is to ensure that every man, woman, and child experiencing homelessness in Bloomington has access to a safe environment where they can rest easily and confidently while working toward addressing the root causes of their homelessness.

Project Synopsis: Wheeler Mission is seeking an investment of \$18,226.48 to purchase security upgrades at both the Center for Men and Center for Women in Bloomington. Specifically, Wheeler will purchase and install new security cameras/equipment at both shelter locations, along with a remodeling of the front entrance at the Center for Women that includes a walk-through metal detector.

Wheeler hosted an average of 139 men, women, and children (all unduplicated) each night at the Bloomington shelter sites in February 2019. This is up from an average of 84 guests each night in February 2017 and 100 guests each night in February 2018. Despite these increases, and the increased security risks that come with serving more people, Wheeler staff are using security systems designed for residential use and require cumbersome efforts to replay video footage when needed. In fact, the security system at the Center for Men includes only three indoor cameras and is over ten years old; acquired and self-installed by Backstreet Missions.

Installing new equipment and remodeling these spaces will be like hiring additional staff as they look to ensure all guests are safe and secure. Coverage of high traffic areas throughout the facilities, and immediate access to footage captured in those areas, will reduce the number of incidents reported on these properties while, simultaneously, providing the peace of mind many guests are seeking as they look to focus on achieving their goals and addressing the root causes of their homelessness.

Criteria:

Need – Data from Monroe County Public Library’s 2017 community survey indicates that the top three concerns for the local community are: 1) homelessness, 2) opioids/addictions, and 3) affordable housing. This correlates with data collected from the United Way’s latest ALICE (Asset Limited, Income Constrained, Employed) report, where it was reported that 63% of Bloomington households are below the ALICE threshold; most of any city in the state of Indiana.

Wheeler Mission, along with many other social service agencies in the community, is absorbing the real impact of these reports. Data collected from the Homeless Management Information System (HMIS) shows that Wheeler Mission provided lodging to 104 men at the Center for Men, alone, as recent as a Thursday evening in mid-March. For the past year, it is more frequent than infrequent that there are over 100 men, women, and children seeking emergency shelter, food, and clothing at a Wheeler Mission site every night.

In providing these men, women, and children the most secure environment possible while they seek shelter and work toward independent living, it is critical that the security equipment utilized is congruent and in alignment with the usage of these facilities and the need in the community.

One-Time Investment - Wheeler Mission seeks a one-time investment to purchase and install security equipment at both shelter locations and remodel the front entrance at the Center for Women, in an effort to provide the most safe and secure environment possible for the community’s most vulnerable population.

Subsequent to the installation of the security upgrades/equipment, ongoing costs associated with the maintenance of the systems will be absorbed by the general operating budget of the agency. It is expected that the security systems being acquired and installed will be utilized for a minimum of five years, with hard drives and camera equipment being replaced (if deemed necessary) at that time.

Fiscal Leveraging – Wheeler Mission developed a five-year strategic plan in 2018. One of the objectives generated from the plan is building a culture of safety and security. Executive leadership is currently in communication with a safety consultant to inspect, and potentially create action plans for, all Wheeler facilities. In the coming year, security upgrades will be installed at all shelter locations in both Bloomington and Indianapolis, with Wheeler leadership approving monies from existing investments to

be used for this priority (as needed). No Wheeler shelter sites have a more pressing need for security upgrades than the existing sites in Bloomington.

Broad & Long-Lasting Effects – Installing security upgrades at both shelter sites will result in more effectively providing an environment where the community’s most vulnerable population feels safe and secure. Creating this type of environment allows for trusted relationships to be established, which can go a long way toward not only attracting those in the most need to these shelter sites, but also in addressing the unique needs of every individual served.

Additionally, the upgraded security capabilities will serve as a deterrent to conflict at both sites, easing a burden on local resources. With additional camera coverage, staff will be able to intervene and de-escalate potential conflict between guests. Furthermore, with the additional cameras outdoors, staff will be able to re-direct guests who may be wandering onto adjacent properties; reducing or preventing complaints from neighboring businesses. As more men, women, and children experience homelessness and seek shelter at these sites, neighboring businesses are more aware of the boundaries that exist between properties. In lieu of these businesses pursuing additional outdoor lighting or security cameras on their properties, Wheeler Mission will absorb these investments for the benefit of the community.

Outcome Indicators: The funding request is for security equipment/upgrades that will last a minimum of five years. Outcome indicators for the coming funding period include:

- Providing a safe and secure environment, where all areas of the shelter property are covered by quality security camera equipment, to an average of 140 men, women, and children every night.
- Reducing the number of incidents reported by guests where they are accused of, or accuse another guest of, violating personal property due to staff having access to immediate recall of video footage captured at locations throughout the properties, both indoors and outdoors.

Cost

Amount Requested (*in order of priority*)

| | |
|--|--------------------|
| 1. Security camera upgrades at Center for Men | \$4,444.93 |
| 2. Security camera upgrades at Center for Women | \$4,561.60 |
| 3. Remodel for Guest Service/Front Entrances at Center for Women | \$5,5000.00 |
| 4. Walk through metal detector for Center for Women | \$3,719.95 |
| TOTAL REQUESTED | \$18,226.48 |
| Total Project Cost | \$18,226.48 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|--|-------------|
| 2016 | Denied | Eight-passenger van | \$20,835.00 |
| 2017 | Granted | To pay for security cameras and associated equipment for the Center for Women and Children, located at 400 S. Opportunity Lane, Bloomington. Indiana 47404 | \$2,044.00 |
| 2018 | Granted | Expand Capacity | \$25,000.00 |

Staff Comments

Note that in 2017, the Hopkins Committee granted Wheeler was granted \$2,044 to pay for security cameras and associated upgrades at the Women’s House. (Specifically, 16 new HD cameras, video server, monitor and cables.) As part of this year’s requests includes upgrades to the security cameras at the Women’s House, the Committee might want to inquire more particularly about the nature of those upgrades.

**27. AREA 10 AGENCY ON AGING + ALZHEIMER'S RESOURCE
+ CITY'S PARKS AND RECREATION + COMMISSION ON AGING**
Expansion Endwright Center services to Bloomington- \$9,775.48

City Residents Served: 14,265 (of 125)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 62 | 11 | 250 |

Mission: The mission of Area 10 Agency on Aging is to serve as a leader in providing resources, solutions and connections for seniors, persons with disabilities and family caregivers living in Monroe and Owen counties.

Project Synopsis: Area 10 requests \$9,775.48 to support the initial expansion of our successful senior center programming at the Endwright Center into a City of Bloomington location, making these health and wellness programs more accessible to a greater population.

Since January, a small collaborative committee has been meeting to address this need. A partnership between Area 10, IU Health Alzheimer's Resource Service, and City of Bloomington Parks and Recreation has developed to support the expansion of services at a pilot satellite site June - December 2019. The partners will continue to collaborate to secure funding beyond 2019 if the pilot project is successful.

In 2016 and 2019 community surveys, older adults in Bloomington continually express the need for a senior center in the City. They need wellness opportunities as well as socialization provided by a supportive, vibrant, and accessible senior center.

Evidence based programming increases physical strength (94.5%) and social well-being (64.9%), based on participant assessments at the Endwright Center. Confidence levels in performing Activities of Daily Living (ADLs) increase, while pain felt decreases.

Criteria:

Need - In January 2016, Area 10 conducted a community wide assessment for our Endwright Center services. 76% live in Bloomington, want expanded services on Tuesdays and Thursdays (at 60%), and would likely attend fitness (62%), educational (57%), and arts (42%). Favored educational programs were on nutrition/weight loss and mental health support and resources.

For our 2019 Community Needs Survey for older adults, respondents identified a senior center in Bloomington as one of their "top three priorities." About 47% of respondents identified "wellness opportunities" as inadequate or insufficient, while 40% identified "fitness opportunities" as such.

As a program of Area 10, the Endwright Center is distinctive in our community. We are uniquely dedicated to providing a safe and supportive environment where active older adults can enhance their well-being through health, fitness, friendship and creative arts programming, with an emphasis on keeping classes free or affordable for all seniors. Our evidence based programming we know 94.5% report improved physically and 64.9% social well-being. At least 30% increases in confidence performing ADLs, strength, maintaining and regaining balance, and flexibility reported in assessments after one year of activities. Additionally, participants reported decreased pain.

With City programming, we estimate serving at least 125 older adults initially.

One-Time Investment - We are requesting a one-time funding to get the expansion of services started for the remainder of 2019 with the intent of securing ongoing operational support through our partnership.

One-time funding would support a staff person on-site for planning, coordinating and staffing Center operations two days per week. Area 10 would provide Center oversight, a dedicated laptop, and advertising/printing in-kind.

Fiscal Leveraging - Area 10 relies heavily on volunteers to operate the Endwright Center. We have a successful recruitment and retention experience and will extend that to support the City Center location. Anticipate at least two volunteers per week to work alongside on-site Area 10 staff person. Programming will begin with wellness activities (balance class, Walk with Ease, Stepping On) and arts/music possibly expanding. The latter would be supported by Area 10's Indiana Arts Commission grant and program fees. Educational programming will be coordinated with partners from Purdue

Extension, IU Trauma Center, area professionals, and IU Alzheimer’s Resource Service, as referenced above.

Broad & Long-Lasting Effects – Extending Center services to the City will increase physical and mental health of older adults who otherwise cannot afford or access alternative services. Individuals will have a drastically reduced experience of social isolation. Creative arts activities will enhance brain health, as well as coordination, to improve the quality of life for older adults as they age. Balance related programming will yield a reduction in falls, a serious threat to older adults. Though we do not have participant specific results that tie improvements to overall cost to the health care system, we know nationally that they do. The CDC reports that physically active adults generally live longer and have lower risk of heart disease, strong type 2 diabetes, depression, some cancers, and obesity (State Indicator Report on Physical Activity).

Evidence shows that preventions of falls improves quality of life and greatly reduces health care costs, as well as giving older adults longer productive and independent lives (Health Professional’s Handbook). Annual direct medical costs for fall injuries are \$31 billion. Our programming is proven to reduce risks of falls, as well as improve social connections. Older adults account for 12% of the population now and estimated to increase to 17.5% by 2050.

Outcome Indicators: Through expanded City services, we expect to serve initially 125 older adults in 2019 and increase annually thereafter. For comparison, we serve about 500 older adults at our Endwright Center and about 16,000 visits annually. Center will provide programming and social gathering activities at least two days per week from 10 a.m. to 3 p.m.

Collaboration: Area 10 is partnering with IU Health, specifically the Alzheimer’s Resource Service and the City of Bloomington Parks and Recreation and Commission on Aging on this concept. Area 10 focuses on services and resources for older adults and persons with disabilities. One of our programs that we support is the Endwright Center, a vibrant community senior center in Ellettsville. The Center speaks to importance on preventative medicine, so to speak, on improving the aging process by improving individuals’ physical and mental health, as well as combatting social isolation. IU Alzheimer’s Resource Center provides education, screening, and support for persons living with dementia and their care partners. They are a natural partner for resources, education sessions, and community referrals/connections, as they are now with Area 10. The COB’s Parks and Rec obviously is charged with a much broader service demographic and range, which does include recreational center inclusive of senior programming. Commissioners on Aging will support scholarships to cover low program fees for seniors unable to pay. Our committee has been meeting regularly in 2019 and is committed to coordinating community resources for programming at the expanded Center site and promotion. The committee’s intent is to quickly build upon the connections and programming that Area 10 already has to implement a viable Center alternative for Bloomington residents and assess demands and changes along the way. We all know from many community conversations and survey results that there is a stated demand for a Center in the City, specifically for wellness programming. Fitness programming needs are met through Twin Lakes and the Y. With successful launching, we will build the ongoing staff support to continue its operation past the pilot stage.

Cost

Amount Requested (*in order of priority*)

| | |
|--|--------------------|
| 1. Expanded Center on-site staff specialist (6/17/19 to 12/31/19) – 12 hrs/week for 28 weeks | \$7,116.48 |
| 2. Estimate space rental costs at \$500/mo for six months | \$3,000.00 |
| 3. Dedicated cell phone for Center operations | \$259.00 |
| 4. | |
| TOTAL REQUESTED | \$9,775.48 |
| Total Project Cost | \$16,476.56 |

Past SSF Funding

| Year | Status | Title | Amount |
|------|---------|--|-------------|
| 1995 | Denied | Handyman Program | \$30,000.00 |
| 1997 | Denied | Senior nutrition services – freezer, fridge, range | \$8,606.00 |
| 1999 | Denied | Laptops | \$4,000.00 |
| 2002 | Granted | To purchase equipment for the Food Pantry at the Girls, Inc site | \$1,475.00 |

| | | | |
|------|---------|--|-------------|
| 2003 | Granted | To pay for 50% of the annual wage for the Food Pantry/Emergency Food VISTA | \$4,614.00 |
| 2004 | Denied | 2-1-1 Call Center | \$3,362.00 |
| 2006 | Granted | To purchase IRis online software for the Go Live with 211 infoline initiative | \$2,187.33 |
| 2008 | Denied | Aging and Disability Resource Center | \$23,500.00 |
| 2012 | Granted | Nutrition links –Area 10 – Collaborative - Community Kitchen | \$7,800.00 |
| 2013 | Granted | To purchase a new refrigerator, freezer, utility carts and folding tables to expand the Mobile Food Pantry Program located at the Fairview United Methodist Church at 600 West 6th Street. | \$3,535.00 |
| 2015 | Granted | To purchase a new refrigerator, freezer, utility carts, and shopping carts to help expand and aid the nutrition services for the homebound | \$2,875.00 |
| 2016 | Granted | To purchase gardening beds, fencing, soil, garden mix, plants, and seeds for the Area 10 Vegetable Garden, providing produce to Mobile Food Pantry clients. | \$1,400.00 |

Staff Comments

Ratio of City Residents to Clients Served by Project: 14,265 (of 125) – is misstated. *The Outcome Indicator response states that about 125 individuals will use this program and that about 500 individuals use a similar program at the Endwright Center in Ellettsville.*

Request funds for staff, rent, and cell phone without site (but exploring alternatives) – *Well-documented need, but more about plans and contingencies would be useful to gauge viability.*

The Overlook- \$32,517.00

City Residents Served: 2,100 (of 2,500)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~110 |

Mission: Lead organization’s mission statement:

It is the mission of the CSL to make available information, services, projects and networking opportunities for those interested in exploring ecologically sustainable ways of thinking, living and interacting in our community.

The CSL was formed by Bloomington residents in 1992 as an umbrella organization which provides 501(c)3 status to projects, created by community members, that adhere to our goals. Our organization is entirely volunteer-run and depends on funds raised by members to provide quality programming, events, and information about sustainable living

Partner organization’s mission statement:

Our mission is to develop the capabilities of ex-offenders who have made up their mind to stay out of prison, through our transitional life training and hands-on work experience, thus breaking the cycle of homelessness, addiction, and incarceration.

MUM was incorporated in November of 2017, in light of our growing community challenge to reunite and heal families that are handicapped by their traumatic experiences of incarceration, addiction, and poverty. MUM exists to help ex-offenders navigate the landscape of social services in Bloomington, and to provide an individually-tailored, relationship-centered support structure that weaves-together existing ex-offender services while supplementing service-gaps with unique courses, programs, and personal development opportunities that, in combination, restore client self-sufficiency, family relations, and sense of community.

Project Synopsis: The Center for Sustainable Living and Made Up Mind request \$32,517 to fund the expansion of the Glenn Carter Memorial Toolshare (GCMT) programming and services, and building renovations for The Overlook Community Center, new home of the Glenn Carter Memorial Toolshare (GCMT). Funding will cover water and sewer hook-up costs, an ADA-compliant bathroom, and a temporary staff position that will oversee the expansion of the GCMT programming and services.

Building on a lifetime of service by Bloomington activist Glenn Carter, the GCMT preserves Glenn’s 5000+ tools and makes them accessible to Bloomington residents, free of cost. Since 2015, over 150 volunteers have sorted, cleaned, and catalogued Glenn’s collection. Our mission is to alleviate start-up costs of trade-based work, enabling residents who might not otherwise have access to tools to pursue projects and careers in home repair, carpentry, metalworking, and automotive repair. Recently relocated to The Overlook Community Center, a larger, more centrally-located building, the GCMT plans to expand our modest lending program into workshop space with skillshare programming, trades training, and volunteer-supervised shop time modeled after the Bloomington Community Bike Project, a CSL project with 20 years of community service.

JHSSF funding will facilitate major renovations required to expand our programming and outreach. Once renovated, The Overlook Community Center will be positioned to realize Glenn’s vision of building self-sufficiency among people facing economic instability, empowering those who have experienced addiction, homelessness, or incarceration, in particular. To wit, The Overlook Community Center established a referral network with Made Up Mind, the Indiana Recovery Alliance, New Leaf New Life, Shalom Center, and Mother Hubbard’s Cupboard, who will recommend their clientele to our programs.

Criteria:

Need – The 2012 SCAN noted Housing Quality as a barrier to economic stability, noting that 65% of households with income less than \$15,001 report that their home needs major repairs, and that homeowners often postpone small repairs until they aggregate, requiring costly major repairs later. The GCMT’s expanded programming will increase low-income homeowners’ economic stability by providing knowledge and tools necessary to complete basic home repairs and prevent their aggregation. This also complements Strategy 2 in the SCAN 2015-2019 Consolidated Plan, which aims to “[i]mprove existing owner-occupied structures for low- to moderate-income individuals/families” (86), by producing repair self-sufficiency.

In addition, the GCMT will proliferate vocational skills in carpentry, metalworking, and automotive repair. Guided and independent opportunities to learn trade skills, offered free-of-cost, will alleviate economic barriers to vocational education. Our targeted outreach to low-income homeowners, people experiencing homelessness, and people re-entering from jail or prison will ensure that The Overlook Community Center reaches people faced with economic instability. These efforts are consistent with SCAN's emphasis on employment, with the Business Outlook Panel's projection that construction and trade jobs will increase (70), and with the identification of adequate job training as a major barrier to economic stability in low-income households (72).

One-Time Investment - Water and sewer hook-up and the installation of a ADA-compliant bathroom are both permanent, one-time renovations that will greatly expand The Overlook Community Center's capacity to continue renovations, provide educational programming, and host regular volunteer-supervised workshop open hours.

The piloting of a temporary staff position is a one-time investment to help accelerate usability of the space by group members, neighbors, and area residents in need. Further, we wish this role to be filled by a client of M.U.M. because we want to prioritize empowering at-risk demographics and, hence, staffing by a M.U.M client (a) makes the space more inviting and unembarrassing for at-risk demographics, (b) provides us with day-to-day operational feedback from a staffer familiar with our prospective user-base, (c) allows us to test-run a longer-term staffing partnership with M.U.M., helping us to guide our strategic partnership aims and long-term investment plans. Once fully implemented, the space could easily be maintained by volunteers; however, we have confidence that our preference, upon evaluation of the pilot, would be for a longer-term, self-sufficient staffing partnership with M.U.M.

Fiscal Leveraging - Affordable space that is centrally located in the Bloomington area is scarce. The Overlook Community Center minimizes operating costs with a large team of dedicated volunteers. As a project of the CSL, the Overlook Community Center receives valuable resources such as liability insurance, banking and financial management software, website/IT consulting, and administrative support. Our new permanent home relieves us of rental costs and, hence, capital investments in the Overlook Community Center's facilities will have long-lasting value. Not only the GCMT benefits from the renovations, but so do all CSL Projects, in addition to other local organizations with whom we share the space, at no cost.

The Overlook Community Center will continue to leverage both monetary donations and in-kind donations of building materials, tools, and equipment.

Broad & Long-Lasting Effects - The Overlook Community Center is at a pivotal point in our organization's development. The completion of our new permanent space in the Maple Heights neighborhood will allow us to:

- Reduce monthly expenses associated with rent.
- Invest in long-term projects that require permanent modifications to the building.
- Host repeating workshops that accommodate all skill levels.
- Develop a modular workshop space that welcomes many trades and crafts that benefit from shared tools and supplies.
- Address sustainability through self-sufficiency and community interdependence.
- Become a landing place for people re-entering the workforce from incarceration who worked in the trades but may have lost tools due to incarceration.

As an organization that has been active in Bloomington since 1992, the CSL has demonstrated its commitment to support and maintain long-lasting projects with long-term benefits. Our oldest project, the Community Bike Project, helps hundreds of people build self-sufficiency and hands-on bike maintenance skills each year. The Bike Project has become one of Bloomington's welcoming landmarks, and we envision the Toolshare workshop as a meeting space for local craft and tradespeople, people seeking to acquire trades skills, and those needing vocational training to increase their quality of life.

Outcome Indicators: The Toolshare component of the Overlook Community Center will measure its success by surveying the growth of the tool lending program and the impact of trades-skill training on Toolshare participants. Metrics will include:

- Total active members of the Toolshare
- Number of tools lent
- Number of people trained on specialized tools
- Total attendees of GCMT classes and workshops
- Toolshare involvement follow-up
- Assessment of barriers to employment in trade-based jobs
- Estimated home-repair and job-related costs alleviated through Toolshare involvement

Collaboration: The Center for Sustainable Living believes “Equity” to be a pivotal but often-missed component of the “Sustainability Tripod,” while M.U.M.’s program clients are socially and economically disadvantaged, deeply in need of the Equity that true Sustainability demands. Glenn Carter, himself, experienced – and recovered from – addiction, incarceration, and poverty, and we know his wish would be for his tools to help others recover from these struggles, just as they offered *him* a new life path. Hence, the substance of this partnership is mutual cooperation and coordination of a part-time, temporary staffing position – to be filled by a M.U.M. program client – for the operation and management of the tool library housed at The Overlook Community Center, a multi-use community space and tool library owned/held, in trust, by the Center for Sustainable Living. The Center for Sustainable Living and M.U.M. mutually understand and enthusiastically agree to a joint pursuit of Jack Hopkins Social Services grant funding, pursuant to the substance of this partnership. The Center for Sustainable Living will provide the space, equipment, materials, and training, and will administer the funding, while M.U.M. will provide a program client suitable to the part-time, temporary staffing position, assist in their guidance/evaluation, and any recommended, supplementary training.

Cost

Amount Requested (*in order of priority*)

| | Item | Cost |
|---------------------------|---|--------------------|
| Scenario #1 | Domestic Water Service Fee | \$3,300 |
| | Sewer Connection Fee | \$2,775 |
| | Cut and excavate ground for proper tie ins to domestic water main and sanitary sewer main under 12th Street. Furnish and install all necessary piping between main in street and new fixtures inside the building | \$16,750 |
| | 4 months of salary @ \$15 an hour + taxes, 15 hours per week | \$4,032 |
| | Total Requested | \$32,517 |
| Scenario #2 | Cut and excavate ground for proper tie ins to domestic water main and sanitary sewer main under 12th Street. Furnish and install all necessary piping between main in street and new fixtures inside the building | \$16,750 |
| | 4 months of salary @ \$15 an hour + taxes, 15 hours per week | \$4,032 |
| | Total Requested | \$20,782 |
| Scenario #3 | Domestic Water Service Fee | \$3,300 |
| | Sewer Connection Fee | \$2,775 |
| | 4 months of salary @ \$15 an hour + taxes, 15 hours per week | \$4,032 |
| | Total Requested | \$10,107 |
| TOTAL REQUESTED | | \$32,517.00 |
| Total Project Cost | | \$95,967.00 |

Past SSF Funding

Center for Sustainable Living

| Year | Status | Title | Amount |
|------|---------|---|------------|
| 2005 | Denied | Human Power: Service Learning on Wheels | \$3,060.00 |
| 2018 | Granted | Expand Glenn Carter Memorial Toolshare Workshop | \$3,000.00 |

Staff Comments

This appears to be similar to the application submitted by CSL last year re: the Glen Carter Toolshare. Similar to last year's application, this year's application asks for costs associated with sewer and water extension and the creation of a part-time temporary staff position (last year's application also asked for an ADA-compliant bathroom and a roof). Recall that last year, the Committee granted CSL funds for the sewer extension, contingent upon the establishment of the trust and the property being transferred to the trust by 01 October. Unfortunately, CSL did not make that deadline. However, now the trust has been established and the property is held in the trust. The difference appears to be that with this grant, CSL intends to hire a program client of Made Up Mind for the temporary position, hence the collaboration.

Hopkins operates on a re-imbusement system. However, CSL indicates that it would be able to front the cost of paying for staff, subsequently seeking re-imbusement, but requests that the City pay the 22,825 for the water/sewer hookup.

Note that applicant includes a written estimate for the finishing of an ADA-compliant bathroom; however, such finishing is not part of this year's request.

A Secure Home- \$8,497.50

City Residents Served: 60 (of 60)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|----------------|
| 17 | 12 | 1494 (in 2018) |

Mission: Shalom Community Center is dedicated to aiding and empowering people experiencing hunger, homelessness, and poverty. Founded in 2000 in response to a growing community concern about the needs of people without homes, Shalom has grown rapidly these past 18 years to become the most comprehensive response to extreme poverty, most notably homelessness, in Monroe County. Shalom provides daytime and overnight shelter, hunger relief, permanent supportive housing, rapid re-housing, social services and case management, employment support, street outreach, eviction prevention, prescription and health care assistance, 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 Synopsis: Shalom Community Center and LifeDesigns are requesting a collaborative grant in the amount of \$8,497.50 for fifty SCYAN D5 Deadbolt Locks to support the Crawford and Crawford II permanent supportive housing programs.

Housing stability is a key priority for the Crawfords. All of the residents have disabilities and have experienced long-term homelessness prior to moving in. While helping a person move into a new home can be challenging, helping them maintain their homes might be even more difficult.

One of our more significant challenges with helping residents maintain their homes is the behavior of visitors. Visitors can sometimes take advantage of the residents and behave poorly, given a lack of investment in what are other people’s homes. Residents often struggle to say no to visitors and are at times threatened by visitors to get access to their homes. In addition, a significant number of keys are given away or stolen and late night and weekend lock-outs are a challenging problem for property management staff.

The fingerprint locks will be placed on the doors to the resident’s apartments and the residents will be the only ones who can unlock their door. Our hope is this will reduce some of the challenges we’ve had with visitors who don’t respect the buildings or its residents as well as off-hours lockouts.

Criteria:

Need – The 2015-2019 Consolidated Plan listed five City of Bloomington priorities. The third priority reads, “Permanently Supportive Housing. Provide funding for future permanently supportive housing developments. In 2013, the City of Bloomington provided HOME Investment Partnership Funds to assist in the development of the 25 unit Crawford Apartments. Crawford Apartments is a "housing first" supportive housing development.”

This City of Bloomington priority directly refers to support for Shalom and LIFE*Designs*’ first permanent supportive housing program, Crawford Apartments, and calls for future support of similar programs. Crawford II was such a “future” program with City support already demonstrated through HOME Investment Partnership Funds to partially fund LIFE*Designs*’ construction of the building.

In addition, the Consolidated Plan addresses the concerns of chronically homeless people at least ten times.

One-Time Investment - As a capital expenditure, this will be a one-time expense.

Fiscal Leveraging – Both Shalom and LIFE*Designs* provide hundreds of thousands of dollars in funding each year to the Crawford programs, including rental and utility costs, case management, property management, maintenance and repair, security, etc. LifeDesigns will provide the costs of labor for the installation of the locks, valued at approximately \$2,500.

Broad & Long-Lasting Effects – Ultimately, the goal of all Housing First programs is to end chronic homelessness. Chronic homelessness is defined as long-term homelessness due to disabilities. The average age of death for a chronically homeless person is 47 years old. People experiencing chronic homelessness often have a significant impact on social services, health care, and criminal justice. In addition to the obvious benefit it provides to the residents, permanent supportive housing has been

demonstrated to save the community money, approximately a net savings of \$20,000 per person per year. During the first year of Crawford Apartments, we ended more than 300 years of collective homelessness for more than 60 adults and children, saw a 92% housing stability rate, a 65% drop in emergency room use from the previous year, and an 88% drop in incarcerations. This is a solutions-based program for the challenge of chronically homelessness, which achieves exceptional impact.

The goal of the funding of the locks is to increase housing stability, improving the chances that people stay in their homes.

Outcome Indicators: We will measure housing stability over the course of the grant period (i.e. the percentage of residents who remain housed within the given time period). Over 80% would be considered exceptional by national standards. We'll also report general impressions of the residents of the new locks and make note of their durability and effectiveness.

Collaboration: LIFE*Designs*' mission is to partner with people of all ages and abilities to lead meaningful and active lives. The mission of the Shalom Community Center is to aid and empower people experiencing homelessness and poverty.

LIFE*Designs* and Shalom Community Center are partners in two programs providing permanent supportive housing to chronically homeless people with disabilities. LIFE*Designs* owns the buildings, provides property management through Valenti Real Estate Services, provides training to the staff, and participates in eviction prevention. Shalom pays the rents, provides case management, service coordination, and also participates in eviction prevention. Using Housing First and harm reduction principles, Shalom, Valenti, and LIFE*Designs* work very closely together to support the residents to maintain their housing and improve their health and income. Property management and case management communicate daily, making important decisions together.

Cost

Amount Requested (*in order of priority*)

| | |
|---|--------------------|
| 1. Fifty Fingerprint Deadbolt Locks (we can reduce the number of locks if we do not receive full funding) | \$8,497.50 |
| 2. | |
| 3. | |
| 4. | |
| TOTAL REQUESTED | \$8,497.50 |
| Total Project Cost | \$10,997.50 |

Past SSF Funding

Collaborative

| Year | Status | Title | Amount |
|------|---------|--|-------------|
| 2017 | Granted | To purchase Chromebook computers and internet access for residents of Crawford I, Crawford II, and Crawford's scattered sites and to provide staff support for the same as part of the Crawford Homes Technology Access Project. | \$27,949.00 |
| 2018 | Granted | Crawford Homes II Housing First Program | \$10,800.00 |

Shalom

| Year | Status | Title | Amount |
|------|-----------|--|-------------|
| 2003 | Granted | Pay for 6 new phone sets & install 3 new phone lines to E. 4 th facility | \$1,900.00 |
| 2004 | Granted | Pay for part-time food services coordinator to expand breakfast & lunch program, as well as train & provide experience | \$5,500.00 |
| 2005 | Granted | Vertical lift for Shalom Center annex at S. Washington | \$9,000.00 |
| 2006 | Granted | Purchase a communication system & technology system network that includes both server & software at S. Washington | \$7,809.18 |
| 2007 | Granted | Purchase & install a 3-compartment deep wells ink and convection oven for E. 4 th | \$5,450.00 |
| 2008 | Granted | Purchase & install food service equipment for weekday food program | \$11,080.00 |
| 2009 | Granted | Purchase food as well as kitchen & misc. supplies | \$18,000.00 |
| 2010 | Withdrawn | Emergency Hunger Relief | \$9,300.00 |
| 2011 | Granted | Pay for renovations to expand facility on S. Walnut | \$19,000.00 |
| 2012 | Granted | Safer & savvier Shalom | \$15,794.00 |
| 2013 | Granted | Crawford Homes Start-up | \$20,900.00 |

| | | | |
|------|---------|--|-------------|
| 2014 | Granted | Pay for a server, laptops and accessories, computer upgrades, software, guest wi-fi, dual monitors, and installation costs. | \$12,996.14 |
| 2015 | Granted | To purchase 4 washers, dryers, and PureWash systems to allow us to continue to provide laundry services for our homeless and impoverished clients. | \$6,800.00 |
| 2016 | Granted | To pay for two months of operational funding for emergency, overnight sheltering at A Friend's Place, located at 917/919 S. Rogers Street, Bloomington, Indiana | \$25,000.00 |
| 2017 | Granted | To pay for two months of operational funding for emergency, overnight sheltering at A Friend's Place, located at 917/919 S. Rogers Street, Bloomington, Indiana, 47404 | \$29,106.00 |
| 2018 | Granted | Phone System | \$13,740.00 |

LIFEDesigns

| Year | Status | Title | Amount |
|-----------|---------|---|-------------|
| 1997 | Granted | OPTIONS: Upgrading phone and voicemail system | \$13,500.00 |
| 1998 | Granted | OPTIONS: Repair 1991 Club Wagon for client purpose | \$3,000.00 |
| 2000-June | Granted | OPTIONS: Materials, computer, and furniture for resource library | \$5,000.00 |
| 2001 | Granted | OPTIONS: To purchase CPR training equipment to train staff | \$4,966.00 |
| 2002 | Granted | OPTIONS: Materials for program between Options and Center for Behavioral Health to address persons with dual diagnosis | \$5,000.00 |
| 2003 | Granted | OPTIONS: Materials for resource library and speaker fees, Family Partnership | \$1,725.00 |
| 2004 | Denied | OPTIONS: Career Exploration Day Transportation and Costs | \$2,400.00 |
| 2005 | Granted | OPTIONS: Modify wheelchair accessible van for community participation program | \$7,500.00 |
| 2006 | Granted | OPTIONS: Format and rebuild computers and install modems and software as part of the Equalizing with E-cycling program | \$4,000.00 |
| 2008 | Granted | OPTIONS: Purchase refurbished computers, modems and internet services to link between community living homes and the main office | \$4,000.00 |
| 2010 | Granted | OPTIONS: Pay for software, training, video production and resource materials for the Power Up program | \$9,750.00 |
| 2011 | Granted | OPTIONS: Purchase a scanner for the Electronic Records project | \$3,100.00 |
| 2008 | Granted | CHRISTOLE: Pay for installation for a fire sprinkler system in the group home at 1701 Winslow | \$3,500.00 |
| 2010 | Denied | CHRISTOLE: D-Spa Training Conference Lead Trainer | \$2,000.00 |
| 2013 | Granted | To purchase the College of Direct Support and College of Employment Services training packages and to pay for the administrative and performance management fees associated with these training packages. | \$13,470.00 |
| 2014 | Granted | To purchase furniture for bedrooms along with furniture and entertainment equipment for common areas at the Dunn and Winslow homes (located within the City). | \$7,090.00 |
| 2015 | Granted | To purchase the College of Direct Support and College of Employment Services training packages and to pay for the administrative and performance management fees associated with these training packages | \$13,470.00 |
| 2016 | Granted | To pay for the purchase of a wheelchair-accessible vehicle. | \$14,000.00 |
| 2017 | Granted | To purchase tablets, mobile briefcases, and design services for the LIFEDesigns Mobilizing Work Project. | \$15,000.00 |

Staff Comments

No comments.

Tenant Assistance Table to Reduce Evictions- \$15,352

City Residents Served: 288 (of 360)

Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 1 | 1 | 12 |

Mission: South Central Indiana Housing Opportunities is dedicated to expanding housing options for low and moderate-income households in Bloomington, Monroe County, and Brown, Greene, Lawrence, Owen, and Morgan Counties in South Central Indiana. Our vision is to build sustainable and inclusive communities that offer diverse housing options for people of all income levels, ages, and abilities.

Project Synopsis: We are requesting \$15,352 to pilot a Tenant Assistance Table at the Monroe County Justice Center. This is a collaborative project that will be staffed by participating social services, mediation, and legal agencies to provide guidance to tenants during time scheduled for Small Claims Court eviction and damages hearings, approximately five hours weekly. The Tenant Assistance Table will provide support to tenants facing eviction proceedings and other housing issues. The goal is to reduce evictions and improve overall housing stability for renters in the City of Bloomington and Monroe County, particularly low-income households.

Criteria:

Need – In the City of Bloomington, 83% of renter households are low-income (16,815 out of 20,030).

Seventy-six percent of extremely low-income renters (6,805 households) in the city are extremely cost burdened, paying more than 50% of their income on housing (Source: *U.S. Housing and Urban Development Comprehensive Housing Affordability Strategy data, 2011-2015*).

According to Monroe County Circuit Court statistics, there were 719 new eviction cases filed in 2018. Out of those, 339 evictions were granted.

The Tenant Assistance Table offers an essential opportunity to reduce evictions and increase housing stability for low-income renters in the community.

The Tenant Assistance Table will serve the *Consolidated Plan's Strategy 5: Public Service Assistance* (p.3). These priorities call for funding to non-profit organizations that provide a safety net for community members in need.

One-Time Investment - The collaborating agencies intend to apply for a Court Reform Grant issued by the Indiana Supreme Court to continue the project. If this pilot demonstrates success, the Court Reform Grant would supply funding from January 1, 2020 and onward. This grant application will be available in November 2019.

Fiscal Leveraging –

- A grant from the JHSSF would offer seed funding to leverage future funds from other sources such as Perry Township and/or Court Reform grants.
- 480 volunteer hours, valued at \$12,000 with mediation services from CJAM and social services from SCIHO. (Independent Sector, 2017)
- 120 volunteer IU Maurer School of Law students' hours with the Tenant Assistance Project and supervision by the clinical professor, valued at \$3,000.
- Monroe County Circuit Court Judges have offered support and in-kind contributions that include:
 - Information about the Tenant Assistance Table in the summons packet with eviction lawsuit notices.
 - Referral of 100% of tenant cases to this project (participation by tenants will be voluntary); and
 - Conference rooms for meetings with computers and telephones.

Broad & Long-Lasting Effects – Sixty-nine percent of residents are renters in the City of Bloomington. However, Bloomington's high-cost housing market and very low vacancy rate for rental

homes often gives the upper hand to landlords. The Tenant Assistance Table will provide clarity and support for renters, particularly low-income households, who are facing eviction proceedings or other housing issues.

Providing comprehensive legal, mediation, and social service direction with trained staffing and information will be a huge improvement over the currently available resources. We anticipate the Tenant Resource Table will help to reduce evictions and provide more housing stability for renters.

Outcome Indicators:

Anticipated Outcomes for the Tenant Assistance Table from July – Dec. 2019:

- 360 tenants served.
- 288 tenants (80%) estimated to come from low-income households.
- 30 Eviction Damages proceedings resolved through mediation (Rough estimate, as this is hard to predict at this time.)
- 100% of eviction hearing days (52 days) with legal, mediation, and social services resources available for tenants.
- 640 hours logged by volunteers and staff from collaborating agencies.
- Hire of a program coordinator who excels at building relationships, recruiting volunteers, connecting low-income clients to resources, and building the capacity of a local nonprofit.

Collaboration: Agency Partners: All are 501 (c) 3 nonprofits, with the exception of the Tenant Assistance Project, an experiential learning clinic that is part of Indiana University, Maurer School of Law.

- Community Justice and Mediation Center - *promotes a civil and just community through mediation, education, and restorative justice.*
- Justice Unlocked – *a nonprofit sliding-scale legal clinic*
- South Central Indiana Housing Opportunities – *dedicated to expanding housing options for low and moderate-income households*
- Tenant Assistance Project – Indiana University, Maurer School of Law - *provides legal help to tenants who face an immediate threat of eviction. Staffed by law students under the supervision of an attorney.*

Complementary Mission:

The breadth of collaboration on this project will ensure that every tenant who is facing the loss of their housing in Monroe County will have easily available and comprehensive access to social services, free legal aid, and free mediation between landlord and tenant. The hope is that joint delivery of all these services at one place and time will greatly reduce evictions. However, even if housing cannot be retained, the tenant will have an easier time getting new housing by presenting legal defenses, having their security deposits returned, learn of social services available with funds, counseling, and referral to other agencies; and mediation on payment plans so that past due rent can be paid more easily. The comprehensive approach piloted by the Tenant Assistance Table is poised to reduce evictions and improve housing stability in the community.

Existing Relationship:

The participating agencies have been collaborating together as part of a larger Monroe County Eviction Assistance Working Group, convened monthly by Judge Catherine Stafford and Judge Judith Benckart since January 2019 to examine:

- the need for early intervention;
- ways to clarify the eviction process for both landlords and tenants, and
- what resources could help reduce evictions.

Other participating agencies have included Perry Township, Shalom Community Center, District 10 Pro Bono Project, Indiana Legal Services, Indiana University Maurer School of Law, and IU Student Legal Services.

Changes in communication and coordination as a result of the project:

Currently, the Tenant Assistance Project (TAP) provides limited legal assistance for about 15% of the days set aside for eviction hearings. TAP is not able to provide assistance with any damages hearings at its current capacity. The Tenant Assistance Table will ensure legal aid to tenants is available at 100% of eviction hearings. The Tenant Assistance Table will raise the bar on these current services substantially, with twice-weekly coordination among the four participating agencies to train, schedule, and staff the table as well as provide applicable publications and resource materials.

SCIHO will hire a Program Coordinator that will be integral to administer and oversee this project. In addition to recruiting and training SCIHO's social services volunteers to staff at the table, the Program

Coordinator will be the lead contact to communicate with participating agencies, schedule table staffing, logistics, data entry, and compile the demographics and other information collected from each tenant.

Any challenges and steps you plan to take to address those challenges:

Communication can sometimes be a challenge in a joint project with mutual parties. However, as current partners in the Eviction Assistance Working Group, the agencies involved have had the opportunity to establish good channels of communication. We will seek to maintain this for the planning, implementation, and evaluation of the Tenant Assistance Table.

Cost

Amount Requested (*in order of priority*)

| | |
|--|-----------------|
| 1. Tenant Assistance Table twice weekly at the Charlotte T. Zietlow Justice Center | \$15,352 |
| 2. Tenant Assistance Table one day per week for 2.5 hours | \$7,676 |
| 3. | |
| 4. | |
| TOTAL REQUESTED | \$15,352 |
| Total Project Cost | \$32,944 |

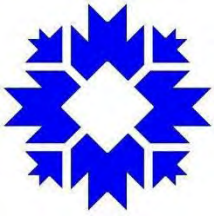
Past SSF Funding

| Year | Status | Title | Amount |
|------|--------|-------|--------|
| | | | |

Staff Comments

Hopkins monies can be claimed from mid-June to early December. However, applicant asks for 38 weeks' worth of funding for the SCIHO program coordinator.

The request is prioritized in terms of the frequency of tabling: 2x/week for 5 hours total (\$15,352) v. 1x/week for 2.5 hours total (\$7,676). However, looking at the program budget, while staff salary constitutes the largest part of the request, the applicant is also asking for a computer, printer, and literature. In light of the request for funding for the SCIHO program coordinator for 38 weeks and the non-salary components, the Committee might wish to inquire if 1x/week at \$7,676 is the only possible partial-funding configuration they could make work or if other alternatives are possible.



CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION

AGENCY CONTACT INFORMATION

Lead Agency Name: All-Options Pregnancy Resource Center, a program of All-Options

Address: 1014 South Walnut Street, Bloomington IN 47401

Phone: 812-558-0089

E-Mail: info@alloptionsprc.org

Website: www.alloptionsprc.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 and Title of Person to Present Proposal to the Committee: Jessica McCanse, Center Manager

Phone: 812-322-7005

E-Mail: jess@all-options.org

Name of Grant Writer: J. Parker Dockray

Phone: 510-817-0781

E-Mail: parker@all-options.org

AGENCY INFORMATION**Lead Agency:**

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|---------------|-----------|------------|
| 3 AOPRC | 0 | 25 |
| 8 All-Options | | |

AGENCY 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 to have all options!

All-Options PRC is a secular, client-centered organization where everyone is welcome. We are proud to offer judgment-free support including free pregnancy tests, peer counseling, diapers, abortion funding, safer sex supplies, menstrual supplies, and referrals to community partners – all under one roof!

Our Hoosier Diaper Program strives to meet the overwhelming and 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 babies clean, dry and healthy, while also supporting families in increasing their economic stability and parenting with dignity.

PROJECT INFORMATION**Project Name:** Hoosier Diaper Program**Total cost of project:** \$25,000 annually**Requested amount of JHSSF funding:** \$10,000**Total number of City residents anticipated to be served by this project in 2019:** 864 (192 families)**Total number of clients anticipated to be served by this project in 2019:** 900 (200 families)**PROJECT SYNOPSIS** (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

All-Options requests \$10,000 to purchase 6 months of disposable diapers and wipes for our Hoosier Diaper Program. This grant would help us meet immediate demand while we continue to make the program more sustainable by seeking donations, sponsorships, grants, and in-kind diaper drives.

The Hoosier Diaper Program is a core part of All-Options Pregnancy Resource Center's services. We provide families who are struggling to make ends meet with diapers and wipes to keep their little ones clean, dry, and healthy. For families enrolled in our monthly program, we provide 3-5 packs of diapers per month (depending on number of children in diapers), as well as emergency assistance up to 3 times per year for families who are not monthly clients. In 2018, All-Options provided more than 3,350 packs of diapers (that's about 100,000 diapers!) and 2,414 packs of wipes to 200 low-income families (nearly 1,000 individual people) in the Bloomington area.

Our clients include single mothers who are struggling to provide the diapers required at their child's daycare; married couples who have cut back on groceries and other essentials to come up with the \$75 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.

Address where project will be housed: 1014 S Walnut, Bloomington IN 47401**Do you own or have site control of the property at which the project is to take place?**

[X] Yes [] No [] N/A

If you are seeking funds to capital improvements to real estate and if you do not own the property at which the project 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.

N/A

Note: Funds will not be disbursed until all requisite variances or approvals are obtained.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

For 2019, we have the following funds expected for the Hoosier Diaper Program:

- Sophia Travis (received 2017 & 2018/pending 2019) \$3,750
- Individual donations (confirmed & pending) \$2,750
- Corporate & local business sponsors (pending) \$2,000
- In-kind donations (confirmed) \$5,000
- Tri Kappa Impact Grants (pending) \$1,500

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

We would plan to submit claims for reimbursement in September and December, each time invoicing for approximately 50% of the funds.

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

We have one pending grant for \$1,500 to Tri Kappa that we will hear about in April, and monthly donations for our Hoosier Diaper Program of approximately \$250 that we expect to receive for the rest of 2019. We will also apply for renewed funding from Sophia Travis in the fall, and continue to seek funding from individuals, community partners, corporations, and foundation grants. We have about \$10,000 in the bank for the program right now, and will continue to support as many local families as our funds allow.

FISCAL LEVERAGING *(100 words or less)*

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

While All-Options has grant funding for staff and core expenses, raising adequate money for the Hoosier Diaper Program has been a challenge. We have received generous support from community partners like Walmart and the Unitarian Universalist Church, but most grants and funding opportunities are one-time, while diaper need is relentless and ongoing.

A grant for operating costs would allow us to serve 100 Bloomington families in our monthly program for the rest of 2019. It would also leverage our Center Manager's time toward building a stronger sponsorship program, community diaper drives, and continued fundraising from private foundations and individual donors.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, **will you be able to proceed with partial funding?**
 Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|---|-----------------|
| Priority #1 | \$1,650 equals a month's supply of diapers for 100 families in our Hoosier Diaper Program. With a grant of \$5,000 we could serve at least 100 families for 3 months. | \$5,000 |
| Priority #2 | \$1,650 equals a month's supply of diapers for 100 families in our Hoosier Diaper Program. With a grant of \$5,000 we could serve at least 100 families for 3 months. | \$5,000 |
| Priority #3 | We will purchase as many diapers and wipes as possible based on whatever funding we receive. | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$10,000 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Access to clean diapers is critical to give infants and toddlers a strong foundation for healthy growth and development, yet the National Diaper Bank Network estimates that 1 in 3 Hoosier families are unable to provide enough diapers for their children. More than 50% of Hoosier families live on less than 200% of Federal Poverty Level (\$41,000/year for a family of three), and the SCAN 2012 found that the number of households that have trouble finding a job that pays enough to meet the family's basic needs has increased across all but the highest income levels.

Diapers are essential for raising kids, but no public assistance program helps families afford them. WIC and SNAP can't be used to pay for diapers; Temporary Assistance for Needy Families checks *can* be used for diapers, but at just \$288 per month for a family of three in Indiana, it falls far short. As a result, local families are regularly forced to make the impossible and heartbreaking choice between diapers, food, and other necessities - or try to stretch the diapers they can find. The Hoosier Diaper Program is a critical program addressing diaper need, which is desperate, overwhelming, and unacceptable.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

We are requesting operational funding under the special allowance for 2019; our request does not meet the exceptions for pilot, bridge, or collaborative funding. All-Options did not receive funding from Jack Hopkins in 2018, and is working hard to sustain our Hoosier Diaper Program so it can meet the urgent needs of local families. We request funding for 2019 while we continue to identify additional income sources; specifically, this year we will be building a corporate sponsorship program, expanding our diaper drives, and applying for more grants in hopes of creating a more sustainable stream of funds for this program.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Children who don't have access to adequate clean diapers suffer from increased diaper rash, infection, and illness. And without their own supply of disposable diapers, infants and toddlers are often not accepted into child care (including subsidized programs), which leads parents to miss work or school, exacerbating their economic challenges and undermining their ability to parent with dignity. In some situations, it can even lead to involvement with CPS when lack of diapers is seen as a sign of neglect. Providing adequate diapers makes a huge difference in the lives of struggling Bloomington families.

Although receiving a supplemental supply of diapers is what most often brings clients to All-Options for the first time, we also hear from families when they have needs and concerns around parenting, housing, health care, substance use/abuse, mental health needs, reproductive health needs, childcare, legal issues, and domestic and sexual violence. We make frequent referrals and connections to safety net providers in Monroe County and beyond, helping our clients meet basic needs. As a trusted resource and access point for services, All-Options and our Hoosier Diaper Program are vital parts of making Bloomington a healthy, thriving community for all of our residents.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: *an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.*

- At least 20 families will come off the waiting list for the monthly Hoosier Diaper Program
- 100 Bloomington families (approximately 450 individual adults & children) will have an adequate monthly supply of diapers for at least 6 months
- 80-100 additional Bloomington families will receive emergency diaper assistance to help them bridge unusual circumstances such as job loss, housing loss, serious illness, or incarceration
- More families will receive an adequate supply of pull-ups for children in potty training; our clients report that All-Options is one of the only local agencies that regularly provides diapers in sizes 4 and up

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 Hoosier Diaper Program not only meets a crucial need for local families, but also serves as an opportunity for community building. Our program relies heavily on our dedicated team of interns and volunteers who work at the Center and meet with clients each week, sort and package diapers and supplies in preparation for diaper pick-up weeks, and help to organize diaper drives and events around town and with allied organizations. All-Options is a valued internship placement site for Indiana University, particularly for the social work and public health departments, and we provide important training opportunities for students so that they can go on to become professionals with a grounding in open-hearted counseling and client services. The Hoosier Diaper Program rallies Bloomington residents to take action to support their neighbors, by donating money, diapers, or time, and together we are building a more compassionate Indiana.

| All-Options Hoosier Diaper Program | | |
|---|-----------------|---------------------|
| | 2019 | |
| Income | | |
| Sophia Travis | \$3,750 | pending |
| Individual Donations | \$2,750 | confirmed & pending |
| Corporate & Business | \$2,000 | pending |
| In-Kind Donations | \$5,000 | confirmed & pending |
| Tri Kappa Impact Grant | \$1,500 | pending |
| Jack Hopkins | \$10,000 | pending |
| | | |
| | \$25,000 | |
| Expenses | | |
| Diaper/wipes purchased | \$20,000 | |
| In-kind diapers distributed | \$5,000 | |
| | \$25,000 | |
| | | |
| Average Monthly Spend | \$1,667 | |
| # of Unique Families | 200 | |
| Total # of Individuals | 900 | |

**All-Options
Balance Sheet
As of December 31, 2018**

| | Total |
|--|------------------------|
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| Chase All-Options Checking | 64,020.53 |
| Chase All-Options Savings | 80,055.56 |
| Chase Business Premium Savings (deleted) | 5,298.31 |
| Chase Premium Savings NEW | 445,195.24 |
| Fidelity Cash Account | 63.85 |
| PayPal | 681.90 |
| Petty Cash Oakland | 8.29 |
| Total Bank Accounts | \$ 595,323.68 |
| Accounts Receivable | |
| Accounts Receivable | 507,512.71 |
| Total Accounts Receivable | \$ 507,512.71 |
| Other Current Assets | |
| Barclays Brokerage | 0.00 |
| Fidelity Brokerage | 0.00 |
| Prepaid Expenses | 0.00 |
| Prepaid Insurance | 1,094.58 |
| Reimbursable Expenditures | 1,275.36 |
| Uncategorized Asset - QBO use | 0.00 |
| Undeposited Funds | 24,895.96 |
| Total Other Current Assets | \$ 27,265.90 |
| Total Current Assets | \$ 1,130,102.29 |
| Fixed Assets | |
| Accumulated Depreciation | -19,028.38 |
| Furniture and Equipment | 11,312.91 |
| Leasehold Improvements | 11,230.00 |
| Total Fixed Assets | \$ 3,514.53 |
| Other Assets | |
| Security Deposits Asset | 5,200.00 |
| Total Other Assets | \$ 5,200.00 |
| TOTAL ASSETS | \$ 1,138,816.82 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Accounts Payable | |
| Accounts Payable | 2,283.74 |
| Total Accounts Payable | \$ 2,283.74 |
| Credit Cards | |
| Chase CC TOTAL | 9,213.26 |
| Total Credit Cards | \$ 9,213.26 |
| Other Current Liabilities | |
| Accrued Payroll | 0.00 |
| Accrued Vacation Payable | 15,738.64 |

| | |
|---------------------------------|------------------------|
| ADP P/R Clearing | 23,018.40 |
| Total Other Current Liabilities | <u>\$ 38,757.04</u> |
| Total Current Liabilities | <u>\$ 50,254.04</u> |
| | |
| Total Liabilities | \$ 50,254.04 |
| Equity | |
| Opening Bal Equity | 209.01 |
| Temp. Restricted Net Assets | 0.00 |
| Unrestricted Net Assets | 294,194.93 |
| Net Income | <u>794,158.84</u> |
| | |
| Total Equity | <u>\$ 1,088,562.78</u> |
| TOTAL LIABILITIES AND EQUITY | <u>\$ 1,138,816.82</u> |

**All-Options
Profit and Loss
July - December, 2018**

| | Total |
|---------------------------------------|----------------------|
| Income | |
| DONATED INCOME | |
| Contributions | |
| Community Partners | 5,766.72 |
| Corporate | 245.81 |
| Individuals | 104,524.54 |
| Total Contributions | \$ 110,537.07 |
| Grants | |
| "Reimbursement" Grants | 866.34 |
| Government Grants | 3,780.00 |
| Institutional Grants | 532,000.00 |
| Total Grants | \$ 536,646.34 |
| Total DONATED INCOME | \$ 647,183.41 |
| EARNED INCOME | |
| Training Income | 50.00 |
| Total EARNED INCOME | \$ 50.00 |
| MISC INCOME | |
| Gain on sale of stock | 4,714.84 |
| Interest Income | 299.93 |
| Total MISC INCOME | \$ 5,014.77 |
| Total Income | \$ 652,248.18 |
| Expenses | |
| CONTRACTORS | |
| Ongoing | |
| Accounting & Finance | 525.00 |
| IT Services | 1,121.45 |
| Legal | 3,330.00 |
| Total CONTRACTORS | \$ 4,976.45 |
| EMPLOYEES | |
| Benefits | 21,870.67 |
| Payroll & Benefits Fees | 3,086.11 |
| Payroll Taxes | 18,337.92 |
| Salaries/Wages | 230,245.63 |
| Worker's Comp Insurance | 2,639.24 |
| Total EMPLOYEES | \$ 276,179.57 |
| OPERATIONS | |
| Appreciation | 516.72 |
| Abortion Funding | 18,396.50 |
| Client Supplies | 117.52 |
| Diapers & Wipes Purchased | 9,211.36 |
| Conferences & Workshops (Attended) | 1,426.02 |
| Furnishings & Repairs | 106.99 |
| Hosted Trainings & Events | 5,593.76 |
| Info Technology | 5,187.19 |

| | |
|--|----------------------|
| Insurance | 2,669.59 |
| Licenses & Registrations | 25.00 |
| Memberships & Alliances | 1,525.00 |
| | |
| Office Supplies & Materials | 1,242.16 |
| Outreach/Marketing | 850.23 |
| Postage & Shipping | 750.69 |
| Printing & Copying | 3,217.03 |
| Rent & Utilities | 18,428.91 |
| Service Charges | 859.33 |
| | |
| Telephone & Internet Svcs | 3,382.99 |
| Travel | 3,223.90 |
| Total OPERATIONS | <u>\$ 76,730.89</u> |
| Total Expenses | <u>\$ 357,886.91</u> |
| | |
| Balance | \$ 294,361.27 |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Amethyst House

Address: P.O. Box 11, Bloomington, IN, 47402

Phone: (812) 336 - 3570

E-Mail: glovell@amethysthouse.org

Website: <http://www.amethysthouse.org/>

President of Board of Directors: Brian Garvey

Name of Executive Director: Mark DeLong

Phone: (812) 336 - 3570 ext. 206

E-Mail: mdelong@amethysthouse.org

Name and Title of Person to Present Proposal to the Committee:

Hannah Crouch, SPEA Communications and Development Fellow

Phone: (812) 336 - 3570 ext. 210

E-Mail: hcrouch@amethysthouse.org

Name of Grant Writer: Hannah Crouch

Phone: (812) 336 - 3570 ext. 210

E-Mail: hcrouch@amethysthouse.org

AGENCY INFORMATION

Lead Agency: Amethyst House

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 14 | 19 | 14 |

AGENCY 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.

Our mission is to provide a foundation for sober living by partnering with individuals, families, and communities impacted by addictions and substance-abuse issues, offering quality recovery services and guidance for clean, sober and healthy living.

PROJECT INFORMATION

Project Name: Upgrades to Men's and Women's Houses

Total cost of project: \$19,005.93

Requested amount of JHSSF funding: \$18,055

Total number of City residents anticipated to be served by this project in 2019: 450

Total number of clients anticipated to be served by this project in 2019: 125

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

We are requesting \$9,077 to expand the case managers' office at the women's house into two offices. To best utilize our existing clinical space, we will be expanding the office to accommodate two case managers at a time, doubling our capacity for working with clients at the women's house and providing better privacy for our residents when meeting with case managers.

We are also requesting \$5,932 to place vinyl plank flooring in the basement of our men's house. This will be a great enhance and very aesthetically pleasing for our newly renovated therapeutic space for our residents and their families. It will provide a more durable floor to handle the foot traffic this space receives from residents, staff, outpatient clients, board members, and residents' families. Last year's Jack Hopkins grant allowed us to place this flooring in the upstairs living space at the house which was a great choice as it is durable makes the living room have a very homey feeling.

Lastly we are requesting \$3,046 for a new air conditioning unit for the men's house which upon last inspection is pulling very high amp draw according to our service man, Russ owner of Resler Mechanical. Replacing this unit which is over 15 years old will help to bring our electrical costs down and the system will run more efficiently.

Address where project will be housed:

Men's House
215 N Rogers St., Bloomington, IN, 47404

Women's House
515 S Madison St., 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 to capital improvements to real estate and if you do not own the property at which the project 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.

N/A

Note: Funds will not be disbursed until all requisite variances or approvals are obtained.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

N/A

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

Beta Sigma Psi's Dodging Addiction Fundraiser - \$8,000 (pending)

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

If granted approval by the Jack Hopkins committee, Amethyst anticipates submitting claims for the projects as soon as possible, beginning in early summer 2019.

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

We anticipate receiving the funding from the Beta Sigma Psi fundraiser by the end of May.

FISCAL LEVERAGING (100 words or less)

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

Financial:

1. We will use \$950.93 from our spring fundraiser with Beta Sigma Psi for this project.

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|--|-----------------|
| Priority #1 | Women's House Office Expansion | \$ 9,077 |
| Priority #2 | Men's House Basement Floor | \$5,932 |
| Priority #3 | Men's House Air Conditioning Unit | \$3,046 |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$18,055 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Amethyst House is currently in its 38th year of operation, serving as many as 34 residential clients at any given time, both men and women (sometimes accompanied by their young children), who are recovering from the profound impact of drug and alcohol addiction. Indiana was home to 1,840 overdose deaths in 2017, an 18% increase from the previous year. This makes Indiana's overdose death rate significantly higher than the national average. Our average stay for clients is 3-4 months, but we offer housing up to two years if clients need to stay longer. The at-risk population which we serve often experiences chronic homelessness and incarceration/institutionalization as a result of their addictions; Amethyst strives to help clients break this cycle with stable housing and aiding them in maintaining sobriety and building financial independence (in accordance with #7 "Meeting Essential Needs" in United Way's SCAN report).

The Jack Hopkins funding initiative has served Amethyst on numerous occasions, including major renovations, improvements, and new appliances. We hope that we will once again be considered by the Jack Hopkins Committee as we continue to upgrade our living facilities to meet new residential requirements and increase clinical and therapeutic space to better serve our clientele.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

The expansion of the office at the women's house is a one-time construction project.

The new floor at the men's house basement will be a one-time installation. Vinyl plank flooring lasts 10-20 years on average but can last longer, so this should not need to be replaced for at least a decade.

The air conditioning unit will be a one-time installation that is estimated to last over 10 years.

LONG-TERM BENEFITS (200 words or less)

Over the past 37 years, Amethyst House has managed to sustain itself on a modest budget and with limited staff and resources. As one of just a handful of financially accessible treatment facilities accessible for those who do not have private health insurance to absorb the cost, Amethyst House is becoming increasingly unique in the state of Indiana.

However, in utilizing older buildings for our residential houses, Amethyst is often faced with repairs, upkeep, and improvements. And every year, given new grant funding opportunities, we look for ways in which we can request assistance for bettering our facilities. We remain proactive in renovations, repairs, and any other improvements that will prevent larger-scale and/or long term damage to our houses; this helps minimize financial impact to our organization and allows us to continue to serve as a critical resource for those battling substance abuse as well as expand our capacity in order to serve a broader population. By expanding offices space, putting in a more durable floor, and replacing the air conditioner unit we will be ensuring that our facilities can better serve our community for longer.

Explain how your program will have broad and long-lasting benefits for our community.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use to measure the success of your project.

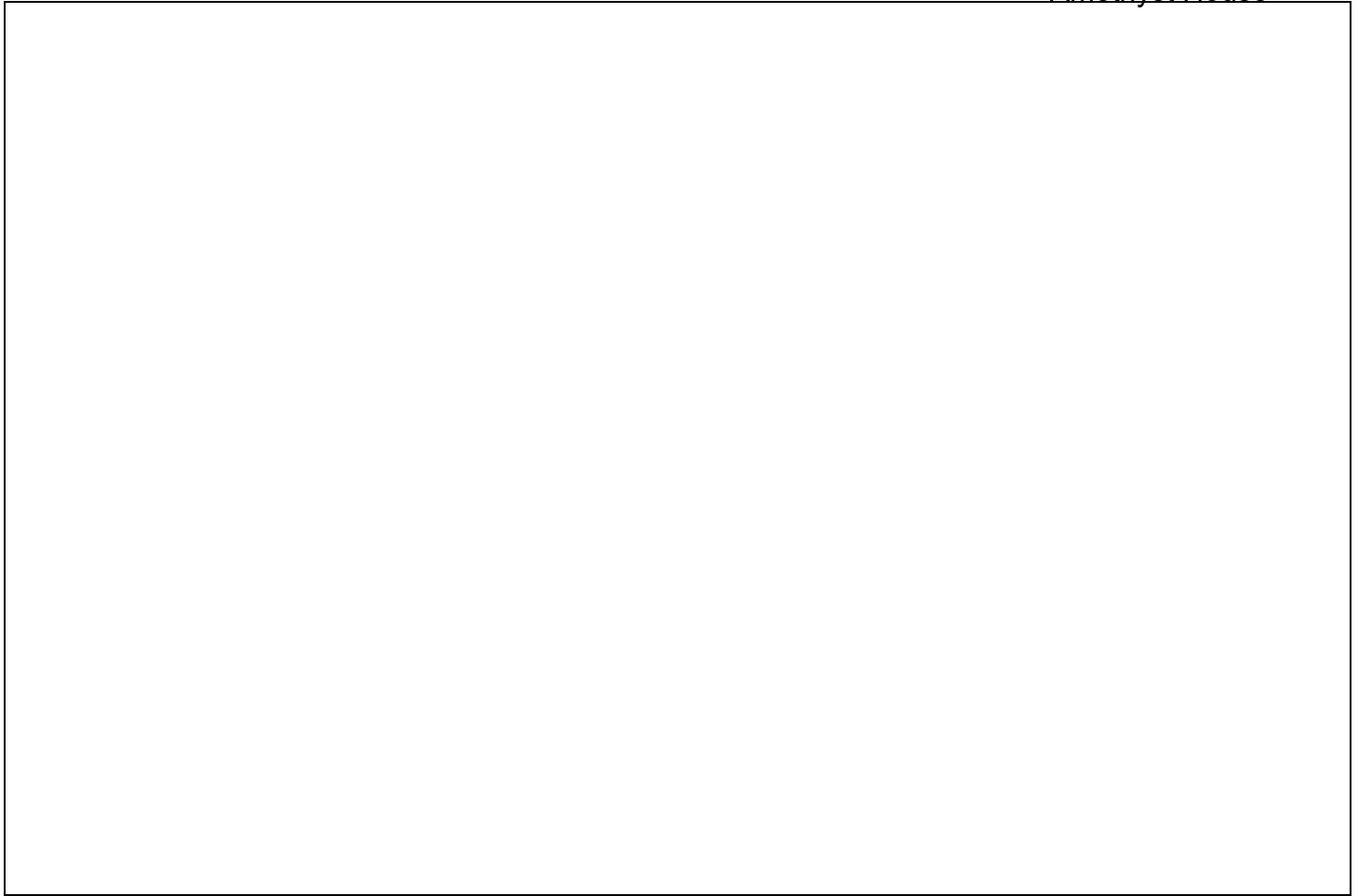
The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

- Increase capacity for individual counseling and case management sessions at the women's house by 10%.
- Increase group and family sessions at residential settings by 30% in the next year. Currently most of our therapy sessions for residents take place at our outpatient office.
- Increase use of residential space for board meetings and 12 Step meetings by up to 20%.

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.



Amethyst House Budget

| Item | Total | Leverage | Total Requested After Leverage |
|---|--------------------|-----------------|--------------------------------|
| I. Women's House Office Expansion | \$9,555.00 | \$478 | \$9,077 |
| Move wall & lighting, outlets to accommodate \$6,300 | | | |
| Install new carpet \$2,880 | | | |
| Install 2 nd door into expanded office \$375 | | | |
| I. Men's House Floor | \$6,244.93 | \$312.93 | \$5,932 |
| Labor \$2,804.00 | | | |
| Materials \$3440.93 | | | |
| II. Men's House AC Unit | \$3,206.00 | \$160 | \$3,046 |
| | | | |
| Total Project Cost | \$19,005.93 | | |
| | | | |
| Leveraged Funds | | | |
| Beta Sigma Psi Fundraiser | | \$950.93 | |
| | | | |
| Total Requested | | | \$18,055 |

Proposal # 2046

March 28, 2019

Premier Construction & Design
6505 W. Betula Drive
Ellettsville, IN 47429
Matt Hammond (812)340-0359

Proposal of services for Amethyst:

Material: lumber, electrical wire, ceiling fan/light, door hardware, siding, drywall, primer, paint

Labor: remove existing wall, rebuild wall 4ft out, install partition wall to make 2 offices, add 2 outlets on inside of offices, add one outlet on outside of wall, drywall and finish wall, paint to match existing color, remove window to accept new wall placement, reswing entry door to right swing, add ceiling fan/light to other side of partition wall, install/move light switches as needed for changes

Total: \$6300.00

Alt.#1: install new carpet in offices \$2880.00

Alt.#2: Install keyed pocket door for second office \$375.00

Thank you,

Fawnya Hammond
Premier Construction & Design
6505 W. Betula Drive
Ellettsville, IN 47429

Quote

Bounds Flooring, Inc.

5005 N. State Road 37, Business
 Bloomington, IN 47404
 812-332-6555

To
 Amethyst House
 215 N Rogers Street
 Bloomington IN
 Randy 360-4179

Invoice #
 Date 7/18/2018
 Expiration Date 8/17/2018

| Salesperson | Job | Payment Terms | Due Date |
|-------------|-----|------------------|----------|
| Lisa Clarke | | Due upon receipt | |

| Quantity | Description | Tax | Unit Price | Line Total |
|----------|--|-----|------------|-------------|
| | Corestc pro plus vinyl plank, rigid composite 1.5 mm thick | | \$ 2.65 | \$ 2,751.34 |
| | with a 20 mil wear layer. There are 10 color choices. All | | | \$ - |
| | have a wood visual. This amount covers the basement | | | \$ - |
| | area and the bathroom | | | |
| | Armstrong sheet vinyl, stratamax good to cover the laundry | | \$ 10.50 | \$ 206.54 |
| | vinyl, double sided tape | | | \$ 31.50 |
| | silver flat metal | | | \$ 23.80 |
| | ardex feather finish for minimal prep to fill expansion joints | | | \$ 69.75 |
| | 4 1/2" tall vinyl cove base | | | \$ 288.00 |
| | freight for Coretec | | | \$ 70.00 |
| | Labor to install via floating , undercut door jambs | | | \$ 2,360.00 |
| | Labor to install sheet goods via loose lay | | | \$ 180.00 |
| | Labor to install cove base | | | \$ 264.00 |
| | NOTE THIS IS BASED ON THE CUSTOMER REMOVING THE | | | \$ - |
| | TOILET , MOVING APPLIANCES AND FURNITURE | | | \$ - |
| | | | | \$ - |
| | | | | \$ - |
| | UNFORSEEN FLOOR PREP WILL BE BILLED AT ADDITIONAL | | | \$ - |
| | TIME AND MATERIALS | | | \$ - |

This quote does not include floor prep labor or materials. - Demolition of existing materials is not included in this quote unless it appears as a line item above that interfere with flooring manufactures warranties or specifications will in no way be the responsibility of Bounds Flooring.- All overhead work and other activities should be completed before flooring installation begins.- Existing substrates or Substrates prepared or applied by other construction trades or contractors that does not meet scheduled flooring materials manufactures tolerances for flatness, smoothness or moisture content will be considered floor prep and is not included in this quote. -Waxing of finishes is not included in quotes. Chemical adhesive removers or treatments applied to substrates that interfere with flooring manufactures warranties or specifications will in no way be the responsibility of Bounds Flooring - All overhead work and other activities

| | |
|--------------|--------------------|
| Sub-total | \$ 6,244.93 |
| Sales Tax | \$ - |
| Total | \$ 6,244.93 |

215 N. 9th

Job Invoice

| | | | |
|----------------------|--|--------------|------------------|
| SOLD TO | | DATE ORDERED | ORDER TAKEN BY |
| AMATHIST HOUSE | | PHONE NO. | CUSTOMER ORDER # |
| 645 N WALNUT | | JOB LOCATION | |
| Bloomington IN 47401 | | JOB PHONE | STARTING DATE |
| | | TERMS | |

| QTY. | MATERIAL | UNIT | AMOUNT | DESCRIPTION OF WORK |
|-----------------|---|------|--------|---------------------|
| #1 | SERVICE AC. FREON Amps COILS, DRAIN CONTACTOR, CAPACITOR, COND, FAN MOTOR, SYSTEM WORKING PROPERLY & AT PEAK EFFICIENCY. | | | THANK YOU! Russ |
| #2 | SERVICED AC - FREON, Amps COILS, DRAIN, CONTACTOR CAPACITOR COND, FAN MOTOR | | | |
| | THIS UNIT IS PULLING VERY HIGH AMP DRAW - WILL NOT LAST NEEDS REPLACE | | | |
| | EST TO REPLACE \$ 3206 ⁰⁰ | | | |
| TOTAL MATERIALS | | | | |

| MISCELLANEOUS CHARGES | | | |
|-----------------------|------|------|--------|
| LABOR | HRS. | RATE | AMOUNT |
| | | | |
| TOTAL MISCELLANEOUS | | | |
| TOTAL LABOR | | | |

| | |
|-----------------------------------|---------------------------------|
| WORK ORDERED | TOTAL LABOR |
| DATE ORDERED | TOTAL MATERIALS |
| DATE COMPLETED | TOTAL MISCELLANEOUS |
| 6-28-18 | SUBTOTAL |
| CUSTOMER APPROVAL SIGNATURE _____ | TAX |
| AUTHORIZED SIGNATURE _____ | GRAND TOTAL 27 90 ⁰⁰ |

Amethyst House
Profit & Loss
 July 2017 through June 2018

| | Jul '17 - Jun 18 |
|---------------------------------------|-------------------|
| Ordinary Income/Expense | |
| Income | |
| 6000 · DMHA FUNDS | |
| 6010 · Chronic Abuse (CA) Funding | 346,115.99 |
| 6020 · Housing Contract | 119,961.36 |
| 6042 · Gambling | 3,225.00 |
| 6060 · Recovery Works | 238,640.70 |
| | 707,943.05 |
| Total 6000 · DMHA FUNDS | 707,943.05 |
| 6075 · INTECARE | 29,312.00 |
| 6100 · CLIENT FEES | |
| Housing Program | |
| 6105 · Program Participation Fees | 143,084.12 |
| 6106 · Medicaid - PerDiem | 34,650.04 |
| 6108 · RW - Recovery Housing | 9,830.42 |
| 6109 · RW Discount | -74,783.05 |
| 8980 · Program Partic. Fees Write Off | -12,449.63 |
| | 100,331.90 |
| Total Housing Program | 100,331.90 |
| OP Treatment | |
| 6110 · Treatment Fees | 155,677.39 |
| 6112 · RW - Treatment | 8,510.95 |
| 6115 · Client Discounts | -131,060.00 |
| 8990 · Treatment Fees Write Off | -3,847.70 |
| | 29,280.64 |
| Total OP Treatment | 29,280.64 |
| Total 6100 · CLIENT FEES | 129,612.54 |
| 6150 · THIRD PARTY PAY | |
| 6151 · Commercial | 1,645.13 |
| 6153 · Medicaid | 998.93 |
| 6155 · Healthy Indiana Plan | 18,540.49 |
| 6157 · DCS | 1,801.55 |
| | 22,986.10 |
| Total 6150 · THIRD PARTY PAY | 22,986.10 |
| 6200 · DONATIONS | |
| 6250 · Unrestricted | 10,494.14 |
| | 10,494.14 |
| Total 6200 · DONATIONS | 10,494.14 |
| 6300 · FUNDRAISING | |
| Dodging Addiction Fundraiser | 7,536.61 |
| 6310 · NAP | 22,596.00 |
| 6305 · Amazon Smile | 86.32 |
| 6330 · Dine & Donate | 295.64 |
| 6360 · Gift Card Program | 917.25 |

Amethyst House
Profit & Loss
July 2017 through June 2018

| | <u>Jul '17 - Jun 18</u> |
|--------------------------------------|-------------------------|
| 6380 · Concert | |
| 6385 · Sponsors | 14,400.00 |
| 6390 · Tickets | 8,450.00 |
| | <hr/> |
| Total 6380 · Concert | 22,850.00 |
| 6340 · Bricks | 50.00 |
| 6350 · Homeless Walk | 51.76 |
| | <hr/> |
| Total 6300 · FUNDRAISING | 54,383.58 |
| 6400 · GRANTS | |
| 6420 · CARES | 8,853.64 |
| 6430 · EFSP | 7,720.00 |
| 6440 · Jack Hopkins | 20,350.00 |
| 6460 · Perry Township | 3,000.00 |
| 6491 · Blgtn Township Trustee | 400.00 |
| 6492 · Sophia Travis | 3,500.00 |
| 6493 · Bloomington Board of Realtors | 1,000.00 |
| 6495 · St. Thomas | 294.00 |
| | <hr/> |
| Total 6400 · GRANTS | 45,117.64 |
| 6500 · UNITED WAY | 16,638.51 |
| 6600 · OTHER INCOME | |
| 6615 · AH Foundation | 1,333.00 |
| 6625 · Interest Income | 46.04 |
| 6630 · Insurance Claim | 13,543.99 |
| 6675 · Reimubersments | 440.50 |
| | <hr/> |
| Total 6600 · OTHER INCOME | 15,363.53 |
| Total Income | <hr/> 1,031,851.09 |
| Gross Profit | 1,031,851.09 |
| Expense | |
| 7000 · PAYROLL | |
| 7025 · Salaries & Wages | 477,668.47 |
| 7050 · Vacation, Holiday & Sick Pay | 57,351.87 |
| | <hr/> |
| Total 7000 · PAYROLL | 535,020.34 |
| 7100 · PAYROLL TAXES | |
| 7125 · Comp MCARE | 7,371.30 |
| 7150 · Comp SS | 31,518.59 |
| 7175 · Comp SUI | 3,425.72 |
| | <hr/> |
| Total 7100 · PAYROLL TAXES | 42,315.61 |
| 7200 · EMPLOYEE BENEFITS | |
| 7225 · Health Ins. | 59,487.78 |
| | <hr/> |
| Total 7200 · EMPLOYEE BENEFITS | 59,487.78 |

Amethyst House
Profit & Loss
July 2017 through June 2018

| | <u>Jul '17 - Jun 18</u> |
|---|-------------------------|
| 7350 · SUBCONTRACT | |
| Counseling | 447.00 |
| 7355 · Counseling for Change | |
| 7356 · CA Funding | 55,200.00 |
| | <hr/> |
| Total 7355 · Counseling for Change | 55,200.00 |
| 7360 · SPEA Service Corp Contract | 1,370.53 |
| 7365 · INECARE FEES | 1,172.48 |
| | <hr/> |
| Total 7350 · SUBCONTRACT | 58,190.01 |
| 7400 · FUNDRAISING EXPENSE | |
| 7495 · Marketing | 768.74 |
| 7440 · Celebrations | 307.70 |
| 7480 · Concert | 8,730.66 |
| 7490 · Website & Social Media | 329.98 |
| | <hr/> |
| Total 7400 · FUNDRAISING EXPENSE | 10,137.08 |
| 7500 · SUPPLIES | |
| 7510 · Office | 8,602.14 |
| 7520 · Postage & Shipping | 704.97 |
| 7530 · Technology | 4,184.97 |
| 7540 · Printing & Copying | 831.53 |
| | <hr/> |
| Total 7500 · SUPPLIES | 14,323.61 |
| 7575 · DUES & SUBSCRIPTIONS | |
| Website Hosting | 449.64 |
| INARR | 980.00 |
| 7585 · Financial | 1,295.97 |
| 7576 · EHR System | 5,114.99 |
| 7580 · Donor Database | 2,399.99 |
| 7595 · Publications | 643.53 |
| 7590 · Professional | 50.01 |
| | <hr/> |
| Total 7575 · DUES & SUBSCRIPTIONS | 10,934.13 |
| 7600 · MEDICAL FEES | |
| 7625 · Supplies | 3,047.76 |
| 7650 · Clients | 11,239.68 |
| 7675 · Staff | 665.00 |
| | <hr/> |
| Total 7600 · MEDICAL FEES | 14,952.44 |
| 7700 · FOOD & BEVERAGE COSTS | |
| 7725 · Clients | 22,190.29 |
| 7750 · Staff/Board | 8,695.32 |
| | <hr/> |
| Total 7700 · FOOD & BEVERAGE COSTS | 30,885.61 |
| 7800 · RENT | 34,799.99 |

Amethyst House
Profit & Loss
July 2017 through June 2018

| | <u>Jul '17 - Jun 18</u> |
|---|-------------------------|
| 7900 · TELEPHONE | |
| 7910 · Telephone | 7,030.06 |
| 7920 · Internet Services | 2,097.61 |
| | <hr/> |
| Total 7900 · TELEPHONE | 9,127.67 |
| 7950 · UTILITIES | |
| 7960 · Electric | 13,552.57 |
| 7970 · Gas | 4,241.08 |
| 7980 · Water | 6,461.94 |
| 7990 · Cable | 5,073.49 |
| | <hr/> |
| Total 7950 · UTILITIES | 29,329.08 |
| 8000 · INSURANCE | |
| 8010 · Commercial Package | 14,268.01 |
| 8020 · Directors & Officers Liability | 3,160.00 |
| 8030 · Employee Bond | 499.99 |
| 8050 · Rental Property | 1,160.00 |
| 8060 · Umbrella | 2,901.00 |
| 8070 · Workers Comp. | 5,360.02 |
| 8080 · Vehicle | 204.99 |
| | <hr/> |
| Total 8000 · INSURANCE | 27,554.01 |
| 8100 · MAINTENANCE & REPAIRS | |
| Damage | 18,161.24 |
| 8140 · Improvements from Jack Hopkins | 17,692.82 |
| 8110 · SubContract Labor | 9,871.00 |
| 8120 · Supplies | 7,034.58 |
| 8150 · Routine | 6,717.69 |
| | <hr/> |
| Total 8100 · MAINTENANCE & REPAIRS | 59,477.33 |
| 8200 · PROFESSIONAL FEES | |
| 8220 · CARF Survey | 7,868.01 |
| 8240 · CPA | 15,657.98 |
| 8230 · Certifications | 377.21 |
| | <hr/> |
| Total 8200 · PROFESSIONAL FEES | 23,903.20 |
| 8400 · INTEREST EXPENSE | |
| 8420 · Other Mortgages | 9,856.36 |
| | <hr/> |
| Total 8400 · INTEREST EXPENSE | 9,856.36 |
| 8500 · CLIENT EXPENSES | |
| 8580 · Leisure Enhancement | 2,610.46 |
| 8510 · Supplies | 999.65 |
| | <hr/> |
| 8520 · Household Goods (non-consumbl.) | 8,002.35 |
| 8540 · Transportation | 800.00 |
| 8560 · Client Fees - Refund | 2,367.53 |
| | <hr/> |
| Total 8500 · CLIENT EXPENSES | 14,779.99 |

Amethyst House
Profit & Loss
July 2017 through June 2018

| | <u>Jul '17 - Jun 18</u> |
|--|----------------------------|
| 8600 · ADVERTISING | |
| 8610 · Printing | |
| 8630 · Publications | |
| 8640 · Job Advertising | 385.85 |
| 8660 · Public Relations Exp. | 1,050.00 |
| | <hr/> |
| Total 8600 · ADVERTISING | 1,435.85 |
| 8700 · TRAINING | |
| 8725 · Staff Conferences | 3,655.19 |
| 8750 · Conference | |
| 8775 · Materials | 528.91 |
| | <hr/> |
| Total 8700 · TRAINING | 4,184.10 |
| 8800 · TRAVEL | |
| 8810 · Mileage | 2,823.71 |
| 8830 · Gas | 29.99 |
| 8840 · Parking | 201.05 |
| 8860 · Lodging | 1,148.05 |
| 8870 · Meals | 246.66 |
| | <hr/> |
| Total 8800 · TRAVEL | 4,449.46 |
| 8900 · EQUIPMENT RENTAL/LEASE/PURCHASE | |
| Equipment Lease | 346.95 |
| Property Taxes | |
| 8900 · EQUIPMENT RENTAL/LEASE/PURCHA... | 4,116.67 |
| | <hr/> |
| Total 8900 · EQUIPMENT RENTAL/LEASE/PURC... | 4,463.62 |
| 8950 · DEPRECIATION | 25,133.00 |
| 9000 · OTHER EXPENSES | |
| 9020 · Gifts | 4,306.77 |
| 9040 · Service Charges | 3,374.40 |
| | <hr/> |
| Total 9000 · OTHER EXPENSES | 7,681.17 |
| Total Expense | <hr/> 1,032,421.44 <hr/> |
| Net Ordinary Income | -570.35 |
| Net Income | <hr/> -570.35 <hr/> |

Amethyst House
Balance Sheet
 As of June 30, 2018

| | <u>Jun 30, 18</u> |
|---|-------------------|
| ASSETS | |
| Current Assets | |
| Checking/Savings | |
| 1000 · ONB 4026850 | 41,431.36 |
| 1030 · PayPal | 718.59 |
| Savings Accounts | |
| 1025 · Reserve Savings #23312 | 61,286.51 |
| 1026 · Depreciation Savings # 5446 | 50,070.41 |
| | <hr/> |
| Total Savings Accounts | 111,356.92 |
| | <hr/> |
| Total Checking/Savings | 153,506.87 |
| Accounts Receivable | |
| 1050 · DMHA | 25,940.84 |
| 1065 · Misc. Grants | 11,119.08 |
| 1070 · Medicaid Per-Diem | 34,650.04 |
| | <hr/> |
| Total Accounts Receivable | 71,709.96 |
| Other Current Assets | |
| 1110 · Accounts Receivable | |
| 1114 · Outpatient AR | 2,172.12 |
| 1116 · Men's House AR | 714.65 |
| 1118 · 3/4 Way House AR | 509.65 |
| 1119 · Women's House AR | 977.00 |
| 1112 · Bad Debt Allowance | -2,000.00 |
| | <hr/> |
| Total 1110 · Accounts Receivable | 2,373.42 |
| 1345 · Petty Cash -- Admin | 200.00 |
| 1360 · Outpatient Change Fund | 30.00 |
| | <hr/> |
| Total Other Current Assets | 2,603.42 |
| | <hr/> |
| Total Current Assets | 227,820.25 |
| Fixed Assets | |
| 1500 · Property 3/4 Way House | |
| 1537 · 416 W. 4th Street | 181,250.00 |
| 1538 · Accum Depreciation - 4th St. | -64,480.55 |
| | <hr/> |
| Total 1500 · Property 3/4 Way House | 116,769.45 |
| 1400 · Property Women's House | |
| 1410 · Second St. Property | 345,906.26 |
| 1420 · Accum Depr.- 2nd St. | -138,619.38 |
| | <hr/> |
| Total 1400 · Property Women's House | 207,286.88 |
| 1415 · Furniture and Equipment | |
| 1416 · Furniture & Equipment | 31,181.13 |
| Office Equipment | 2,194.15 |
| 1417 · Accumulated depreciation | -30,460.13 |
| | <hr/> |
| Total 1415 · Furniture and Equipment | 2,915.15 |

Amethyst House
Balance Sheet
 As of June 30, 2018

| | <u>Jun 30, 18</u> |
|--|--------------------------|
| 1430 · Land | 15,000.00 |
| 1435 · Property Men's House | |
| 1436 · Rogers St. | 439,116.42 |
| 1405 · Accum. Depr.- Rogers | <u>-166,895.27</u> |
| Total 1435 · Property Men's House | <u>272,221.15</u> |
| Total Fixed Assets | <u>614,192.63</u> |
| TOTAL ASSETS | <u>842,012.88</u> |
| LIABILITIES & EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Accounts Payable | |
| 2000 · Accounts Payable | <u>13,376.36</u> |
| Total Accounts Payable | 13,376.36 |
| Credit Cards | |
| Bank of America (Niki #5040) | 16.78 |
| Bank of America (Mark #4426) | 911.35 |
| Bank Of America (Gina #4514) | <u>646.74</u> |
| Total Credit Cards | 1,574.87 |
| Other Current Liabilities | |
| 1365 · Concert Sponsorship Funds | 2,750.00 |
| Alumni Account | 684.80 |
| Payroll - Term Life | 9.17 |
| 3086 · Payroll - Supplemental Insuranc | 113.44 |
| 4022 · Current Portion of LTD | |
| 4025 · Men's | 6,114.00 |
| 4026 · 3/4 Way | 1,549.00 |
| 4027 · Women's | <u>7,519.00</u> |
| Total 4022 · Current Portion of LTD | 15,182.00 |
| 3030 · Accrued Vacation | 13,182.67 |
| 3035 · Payroll - 403 (B) | 375.00 |
| 3040 · Payroll-FEDERAL | 2,813.00 |
| 3050 · Payroll-INDIANA | 2,413.74 |
| 3055 · Payroll-MCARE | 1,088.75 |
| 3060 · Payroll-County Taxes | 1,059.03 |
| 3065 · Payroll-SOCSEC | 4,655.32 |
| 3070 · Payroll-SUI | 891.88 |
| 3075 · Payroll-United Way | 1,114.00 |
| 3095 · Salaries & Wages Payable | <u>11,096.97</u> |
| Total Other Current Liabilities | <u>57,429.77</u> |
| Total Current Liabilities | 72,381.00 |

Amethyst House
Balance Sheet
As of June 30, 2018

| | <u>Jun 30, 18</u> |
|--|-------------------|
| Long Term Liabilities | |
| 4014 · German American - 3/4 Way #662 | 9,267.26 |
| 4015 · German American - Women's #9105 | 72,883.12 |
| 4016 · German American - #22991 | 115,781.41 |
| 4020 · Note Payable - City of Blgtn | 93,500.00 |
| | <hr/> |
| Total Long Term Liabilities | 291,431.79 |
| | <hr/> |
| Total Liabilities | 363,812.79 |
| | |
| Equity | |
| 5000 · Open Bal Equity | 25,491.17 |
| 5005 · Earnings | 453,279.27 |
| Net Income | -570.35 |
| | <hr/> |
| Total Equity | 478,200.09 |
| | <hr/> |
| TOTAL LIABILITIES & EQUITY | 842,012.88 |
| | <hr/> <hr/> |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Be Loved Transportation, Inc.

Address: PO Box 5952 Bloomington, IN 47408

Phone: 812.287.7997

E-Mail: beloved.transportation@gmail.com

Website: www.belovedtransportation.net

President of Board of Directors: Dwayne Cole

Name of Executive Director: Dwayne Cole

Phone: 812.287.2610

E-Mail: beloved.transportation@gmail.com

Name and Title of Person to Present Proposal to the Committee: Dwayne Cole

Phone: 812.287.2610

E-Mail: beloved.transportation@gmail.com

Name of Grant Writer: Theda Fields White

Phone: 616.706.8568

E-Mail: help4us.inc@gmail.com

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [X] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 4 | 1 | 10 |

AGENCY 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 Be Loved Transportation, Inc. is to improve the quality of life among those in need and create opportunities for a career in the industry.

PROJECT INFORMATION

Project Name: Be Loved Wheelchair Program

Total cost of project: \$55,000

Requested amount of JHSSF funding: \$50,000

Total number of City residents anticipated to be served by this project in 2019: 25

Total number of clients anticipated to be served by this project in 2019: 8

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

ASK:

Be Loved Transportation, Inc, is requesting \$50,000 for a wheelchair van with a lift to transport non-ambulatory clients to dialysis. These individuals are identified by the Davita Dialysis Center and Fresenius who see our client population 3 days a week and whom also attend necessary doctor appointments. Failure to meet their appointments compromises their health outcomes due to limited, late, inconsistent or nonexistent transportation due to the inability to transport the client with their wheelchair.

NEED:

Due to the cancellation of Safe-Med Transportation who primarily transported wheelchair clients; traditional Medicaid recipients are left with limited or no transportation resulting in missed dialysis treatment and doctor's appointments and other necessary medical appointments compromising their health outcomes. Be Loved Transportation receives an average of 8-10 calls a day requesting transport for wheelchair bound individuals, meaning we are not able to meet the needs of the client(s) due to our inability to transport with the vehicles we have currently.

BENEFITS:

The immediate benefits of acquiring a wheelchair van with lift capabilities will provide 5-8 clients daily the ability to meet their non-emergency health treatments; therefore reducing emergency medical attention. The impact that carries the greatest weight is the consistency of attending all treatments, which reduces the risk of compromised health and fatalities. Be Loved Transportation, Inc. will have a direct impact on five to eight clients daily, twenty five clients total.

Address where project will be housed:

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 to capital improvements to real estate and if you do not own the property at which the project 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.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

\$5,000 is committed from individual donors as a match to complete the purchase of the wheelchair van

Please 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

Fiscal leveraging for the project and organization is accomplished through donor contributions, fundraising, grants and contracts; ie, medicaid

contributions, or volunteers.

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|--|--------------------|
| Priority #1 | Wheelchair Van with Lift 2019 Toyota L Quote from Superior Van & Mobility | \$50,146.48 |
| Priority #2 | | |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$50,000 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

According to the Service Community Assessment of Needs reports that 'getting transportation for services was a major problem for 4% and a minor problem for 10%'. Transportation Monroe County offers accessible public transit within the city limits at low cost to residents and at no cost to IU students with a valid student identification card. However, transportation options are limited outside of Bloomington and providers indicate that this is a barrier to health access for some of their clients. In the 2010 household survey, 1% of households said this was a major problem, while 7.3% said it was a minor challenge.

Be Loved Transportation, Inc. has been providing non-emergency transportation since August 2016 filling the gap in transportation services for over 200 clients for appointments to; doctor visits, dental visits, mental health appointments, dialysis, chemotherapy and/or radiation, etc. The Be Loved Wheelchair Program will include picking up and dropping off an average of five to eight clients per day. Be Loved Transportation, Inc. will reduce the barriers identified clients who have the common complaint of inconsistent transportation by providing uninterrupted service Monday through Friday from 7:00 a. m to 6:00 p.m. The program consists of five certified and qualified drivers who have been trained for this service by a veteran of over thirty year's experience of owning his own transportation service in Chicago, Illinois. Under his training and leadership hands on experience was learned in the approach of creating routes, time management, and client care. Volunteers will be recruited from the City of Bloomington Volunteer Network and will function in the capacity of answering phones, set schedules, distribute marketing brochures, flyers, escorting clients to and from vehicles. Volunteers will also be used in fundraising efforts.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

Be Loved Transportation, Inc. is requesting a one-time investment of \$50,000 to purchase a wheelchair van with a lift. Once the purchase is complete the organization has the ability to support the operations to transport clients.

LONG-TERM BENEFITS (200 words or less)

The Long Term benefits are that 25 non-emergency medical clients or individuals will have uninterrupted transportation services to all treatment appointments. Be Loved will coordinate scheduling with treatment or medical facilities that will ensure five to eight people a day receive transportation services in a timely manner. The gap of provision for this vulnerable population will be narrowed with an expected outcome to be eliminated. Therefore, reducing the cost of emergency medical care, fatalities, and compromised care. In conclusion, families will be strengthened due to the access of care and renewed health outcomes.

Explain how your program will have broad and long-lasting benefits for our community.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: *an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.*

The outcome impact that carries the greatest weight is the consistency of making all treatments for dialysis, reducing the risk of compromised health and fatalities. Be Loved Transportation, Inc. will have a direct impact on five to eight clients daily, twenty five clients total. The indirect impact is that approximately 50 individuals will make up the family and communities in which they reside and the quality of life they experience by receiving consistent, affordable and easily accessible transportation. In addition, this reduces the stress and frustration of the care providers by aiding them in ensuring their loved ones or patients are receiving the necessary, timely care needed to ensure their quality of life and improved life outcomes.

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.

Name: Be Loved Transportation, Inc. 80-0352317

**Action Step BP 3.1
Program Budget**

Van Lift Budget

| Expenditures | Estimated Amount | Sources for Research |
|---------------------------------------|---------------------|----------------------|
| Security Deposits | | |
| Rent Deposit | \$ - | _____ |
| Telephone Deposit | \$ - | _____ |
| Utility Deposits | \$ - | _____ |
| Other Deposits | \$ - | _____ |
| Capital Expenditures | | |
| Computer Equipment | _____ | _____ |
| Equipment & Machinery | _____ | _____ |
| Furniture & Fixtures | \$ - | _____ |
| Vehicle | \$ 50,106.48 | lift van purchase |
| Gas | _____ | _____ |
| Buildings | \$ - | _____ |
| Land | \$ - | _____ |
| Other Capital Expenditures | _____ | _____ |
| _____ | \$ - | _____ |
| _____ | \$ - | _____ |
| Other Expenditures | | |
| Inventory | \$ - | _____ |
| _____ | \$ - | _____ |
| _____ | \$ - | _____ |
| _____ | \$ - | _____ |
| Expenses | | |
| Accounting Fees | _____ | _____ |
| Activation Fee | \$ - | _____ |
| Corporate Fees & Taxes | \$ - | _____ |
| Federal Tax ID | _____ | _____ |
| Title and Tag | \$ 500.00 | _____ |
| Insurance | \$ 2,500.52 | _____ |
| Legal & Consulting Fees | _____ | _____ |
| Meals & Entertainment | \$ - | _____ |
| Office Supplies | _____ | _____ |
| Payroll Expenses | _____ | _____ |
| Salaries & Wages | \$ 1,893.00 | _____ |
| Payroll Taxes | _____ | _____ |
| Benefits | \$ - | _____ |
| Pre-Opening Advertising | _____ | _____ |
| Printing | _____ | _____ |
| Telephone | _____ | _____ |
| Sales Tax Permits | _____ | _____ |
| Other Start-Up Expenses | _____ | _____ |
| _____ | \$ - | _____ |
| _____ | \$ - | _____ |
| _____ | \$ - | _____ |
| Total Estimated Start-Up Costs | \$ 55,000.00 | _____ |

Be Loved Transportation Inc.

STATEMENT OF FINANCIAL POSITION

As of December 31, 2018

| | TOTAL |
|-------------------------------------|--------------------|
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| LCP Checking (9672) | -5,906.64 |
| Main Checking (4280) | 39,866.31 |
| Private Pay Checking (9859) | 103.76 |
| Total Bank Accounts | \$34,063.43 |
| Accounts Receivable | |
| Accounts Receivable (A/R) | 11,323.50 |
| Total Accounts Receivable | \$11,323.50 |
| Other Current Assets | |
| Uncategorized Asset | 2,036.22 |
| Total Other Current Assets | \$2,036.22 |
| Total Current Assets | \$47,423.15 |
| Fixed Assets | |
| Vehicles | 21,624.13 |
| Total Fixed Assets | \$21,624.13 |
| TOTAL ASSETS | \$69,047.28 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Credit Cards | |
| Credit Card | -211.21 |
| Total Credit Cards | \$ -211.21 |
| Total Current Liabilities | \$ -211.21 |
| Long-Term Liabilities | |
| Auto Loan | 15,203.41 |
| Total Long-Term Liabilities | \$15,203.41 |
| Total Liabilities | \$14,992.20 |
| Equity | |
| Opening Balance Equity | 8,959.45 |
| Retained Earnings | 7,995.02 |
| Net Revenue | 37,100.61 |
| Total Equity | \$54,055.08 |
| TOTAL LIABILITIES AND EQUITY | \$69,047.28 |

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: SEP 14 2009

BE LOVED TRANSPORTATION INC
PO BOX 5952
BLOOMINGTON, IN 47408

Employer Identification Number:
80-0352317
DLN:
17053176302019
Contact Person:
MARIA S TRITCH ID# 31549
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 1, 2009
Contribution Deductibility:
Yes
Addendum Applies:
No

U.S. Dot # 1972057

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.

Letter 947 (DO/CG)



| | | | |
|------------|----------|----------|-------|
| QUOTE DATE | 4/1/2019 | QUOTE NO | 20002 |
|------------|----------|----------|-------|

<< QUOTE >>

| Indiana Locations | | Kentucky Locations | Louisiana Locations | Tennessee Location |
|--|--|---|---|---|
| 5410 Madison Ave. Indianapolis, IN 46227 (317)781-6900 | 4246 Meghan Beeler Ct., Ste 1 South Bend, IN 46628 (574)271-1175 | 1506 Lakeshore Ct. Louisville, KY 40223 (502)447-8267 | 12329 Industriplex Blvd Baton Rouge, LA 70058 (225)663-8830 | 10640 Braden Dickey Ln. Knoxville, TN 37932 (888)340-8267 |
| 2218 Contractor's Dr. Fort Wayne, IN 46818 (260)497-8267 | 3414 Interstate Dr. Evansville, IN 47715 (812)402-8267 | 13095 Parkside Dr. Fishers, IN 46038 (317)436-6722 | 1180 E. New Circle Rd. Lexington, KY 440505 (859)253-1832 | 1901 Westbank Expy Ste 500 New Orleans (Harvey), LA 70058 (504)684-2100 |

www.superiorvan.com

B 3BLT
I Beloved Transportation
L 2514 S. Rogers St.
L Bloomington, IN 47403
T
O

Phone 8122872610

S Beloved Transportation
H 2514 S. Rogers St.
I Bloomington, IN 47403
P
T
O

Phone 8122872610 Fax

| | |
|------------------|------------------|
| TOTAL DUE | 50,106.48 |
|------------------|------------------|

| SLS1 | SLS2 | DUE DATE | DISC DUE DATE | ORDER NO | ORDER DATE | SHIP DATE | SHIP NO |
|------|------|----------|---------------|----------|------------|-----------|---------|
| CLI | | 4/1/2019 | 4/1/2019 | 00214100 | 4/1/2019 | | |

| TERMS DESCRIPTION | CUSTOMER PO NO | SHIP VIA |
|-------------------|----------------|----------|
| DUE NOW | | |

| ITEM ID | TX CL | UNITS | ORDERED | SHIPPED | UNIT PRICE | EXTENSION |
|---------|-------|-------|---------|---------|------------|-----------|
|---------|-------|-------|---------|---------|------------|-----------|

Quotes are good for 30 days.

Federal Tax ID 30-0184223

| TAXABLE | NONTAXABLE | FREIGHT | SALES TAX | MISC | TOTAL |
|------------------|------------|---------|-----------|------|------------------|
| 0.00 | 50,106.48 | 0.00 | 0.00 | 0.00 | 50,106.48 |
| TOTAL DUE | | | | | 50,106.48 |

Like Us on Facebook To Get The Latest Service and Sales Specials
 YOU are our best referral source! Ask for Referral Cards and get paid for sending us new business!



Indiana University Health

3/22/2019

To whom it may concern:

I am writing this letter in support of BeLoved Transportation. I have known Dwayne Cole for several years and utilized the services of his company since its inception. In that time, Dwayne and his staff have been an invaluable resource to my clients living with dementia and many others in the community. They have been trustworthy and go the extra mile to help those who need more support to be able to utilize transportation services. As a small company, they are able to provide the kind of care that is missing from regular cab service, or Uber/Lyft options.

They have received recognition as a "Dementia Friendly Business" in an effort to better serve the high numbers of individuals living with memory impairment in our community. Their willingness to go above and beyond in this fashion has allowed them to forge meaningful relationships with their clients, as well as professionals in the community.

Receiving the Jack Hopkins grant would allow Dwayne and his team to continue providing this vital service to our community, including many who struggle with other types of transportation services. I have no doubt that such support will be a boon to BeLoved's ability to provide a caring option to those who no longer drive themselves. Such individuals face a serious lack of options in our community. Financial support for BeLoved will allow these individuals the ability to connect with essential aspects of their healthcare.

It is my hope that you consider BeLoved worthy of this award. I am happy to answer any other questions that the committee may have.

Thank you for your consideration.

Best,

Dayna Thompson M.S., Ed.S, LMHC
Alzheimer's Educator
IU Health – Community Health
812.353.9299; DThompson6@iuhealth.org

03/19/2019

To Whom It May Concern

The need for medical transportation in Monroe County is reaching an urgent level. Patients on life-sustaining medical treatments are not receiving care due to lack of local transportation to drive them.

Please consider Dwayne Cole for a community grant to allow him to provide transportation for the medical community in Monroe County. Mr. Cole has a professional and diligent manner that makes those in need of medical transport feel at ease. We need Mr. Cole's help with transport in Monroe County.

Sincerely,

Ellen Sharp MSW, LSW

Social Worker in Monroe County

March 20, 2019

To Whom It May Concern:

As a local Medical Social Worker for the past 6 years, I have found transportation to be an essential component to meeting individuals' health needs yet isn't always readily available. Lack of transportation leads to missed appointments. Missed appointments leads to worse health and higher needs. Recent reports regarding this need has had some publicity, with news sources citing SCI Solution's quote of missed appointments costing health care \$150 billion a year. Indeed, this piece of the puzzle for health care is always strained and now, is even more so locally with SafeMed closing its doors as a Medicaid Provider. There are no Medicaid Transportation providers based out of the City of Bloomington any longer. Potentially hundreds of individuals will be without transportation to their appointments with this loss.

People need reliable transportation when they are managing their health matters. Whether it be a follow-up from a recent hospitalization or a visit to check on a wound, Medicaid transportation is a vital part of patient care. Many patients are wheelchair bound or limited in their mobility to the point that a wheelchair van in particular is essential to their health. Other transportation options in town are limited; Rural Transit is restricted in their services, as they can only pick-up individuals outside of the City of Bloomington, and do not travel to Indianapolis for medical appointments. BT Access will not pick-up individuals outside of City limits, and does not travel outside of the County. So, for someone who is wheelchair bound and lives in the City and needs to go to a specialist in Indianapolis, which is often the case with more complex and/or chronic illnesses, transportation is almost impossible to schedule to get to an appointment. What is a person to do?

Bloomington is often thought of as an oasis of resources and support for those who have unmet needs. Providing funds to help BeLoved Transportation become a Medicaid provider will enable this trend to continue in our town. This is a unique opportunity to fulfill a true need for our beloved community.

Sincerely,

Leah Sinn Iversen, MSW, LCSW
Medical Social Worker
Population Health Services
South Central Region
Indiana University Health
(812)929-7004
lsinniversen@iuhealth.org

3-19-2019

Dwayne Cole
Beloved Transportation

RE: Jack Hopkins Grant Support letter for Beloved Transportation

To the 2019 Jack Hopkins Committee:

Dear Councilmember Allison Chopra (Chair), Councilmember Dorothy Granger, Citizen Kaye Lee Johnson, Citizen Nidhi Krishnan, Councilmember Isabel Piedmont-Smith, Councilmember Andy Ruff, and Councilmember Susan Sandberg:

Medical and non-emergency transportation for individuals who are funded through Traditional Medicaid, HIP 2.0, or Medicare is a critical resource. At this time system capacity is lacking and people are having challenges getting to their appointments.

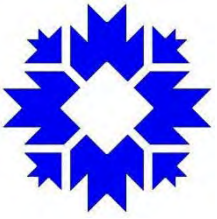
I see this first hand as a Care Manager for Area 10 Agency on Aging. Getting to their doctor's visits, dialysis appointments or surgical consultations helps people receive preventative and timely health care that improves their health outcomes while decreasing the costs of their healthcare.

This transportation helps people who are either unable to drive because of physical or mental conditions, or who cannot afford their own vehicles.

I urge you to award Jack Hopkins funds to Beloved Transportation so that they can continue to provide this critical resource.

Ron Smith, MSW

Care Manager
Area 10 Agency on Aging
812 876-3383



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Big Brothers Big Sisters of South-Central Indiana

Address: 501 N Walnut St, Bloomington, IN 47404

Phone: (812) 334-2828

E-Mail: bbbs@bigsindiana.org

Website: www.bigsindiana.org

President of Board of Directors: Kelly Abel

Name of Executive Director: Danell Witmer

Phone: (812) 334-2828

E-Mail: dwitmer@bigsindiana.org

Name and Title of Person to Present Proposal to the Committee: Danell Witmer, Executive Director

Phone: (812) 334-2828

E-Mail: dwitmer@bigsindiana.org

Name of Grant Writer: Zachary Styers

Phone: (703) 850-8034

E-Mail: zachstyers@gmail.com

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [X] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 5 | 1 | 14 |

AGENCY 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.

Our mission is to provide children facing adversity with strong and lasting, professionally supported one – to – one relationships that change their lives for the better, forever.

PROJECT INFORMATION

Project Name: One to One Mentoring: Bigs with Badges

Total cost of project: \$24,000

Requested amount of JHSSF funding: \$24,000

Total number of City residents anticipated to be served by this project in 2019: 15,000-20,000

Total number of clients anticipated to be served by this project in 2019: 250-300

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Big Brothers Big Sisters of South Central Indiana (BBBSSCI) seeks a one time investment of \$24,000 as funding for a new mentoring program, Bigs with Badges. Bigs with Badges is a program for at risk children who, through this program, will be paired with first responders in their local communities to foster better relationships. Bigs with Badges is solely an initiative of Big Brothers of South Central Indiana in accordance with many other branches of Big Brothers Big Sisters around America.

There is an identifiable problem between law enforcement and communities throughout the United States most noticeably in areas that are less fortunate. What Bigs with Badges aims to do is break down the barrier between children and police in these areas and decrease the idea that officers are only coming into these neighborhoods to arrest someone. The Service Community Assessment of Needs (SCAN) found that there was a need for more afterschool activities and programs for youth, especially school-aged youth. Youth are likely to engage in risk-taking behaviors like substance abuse, sexual conduct, and other behaviors considered delinquent in the hours directly after school.

We hope that through this approach (Bigs with Badges) not only will at risk children gain a positive role model in their community to look up to and strive to be like, but that this will also act as an initiative to further improve the relationship between our men and women in badges and the families in disadvantaged communities.

Address where project will be housed:

Monroe County School Corporation, Boys and Girls Club, Girls INC.

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 to capital improvements to real estate and if you do not own the property at which the project 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 no permits required

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

We are targeting first responders:
Bloomington Police Department
Indiana University Police Department
Monroe County Sheriff's Department
Bloomington Fire Department
Indiana State Police
Indiana Conservation
Monroe County Fire District
Benton Township Fire Department
911 Dispatchers

Monroe County School Corporation
Boys and Girls Club
Girls INC

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*): None at this time

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds: We would make use of time cards for volunteers as well as for staff time keeping. We would then submit requests for payment based on time spent on a monthly basis.

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.

Seeking volunteers from Bloomington Police Department, Indiana University Police Department, Monroe County Sheriff’s Department, Bloomington Fire Department, Indiana State Police, and other first responders who wish to volunteer.

Due to the logistics of township Fire and the mobility of law enforcement, we feel that this project would require limited resources from the agencies while providing maximum outcomes for the community involved.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, **will you be able to proceed with partial funding?**
 Yes No

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

| | Item | Cost |
|-------------|------|------|
| Priority #1 | | |
| Priority #2 | | |

| | | |
|-----------------|--|--|
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The need for our services is clear as it is noted in the Service Community Assessment of Needs (SCAN) Monroe County that youth without supervision or productive activities following school hours are more likely to engage in unhealthy or undesirable behaviors. Afterschool activities can provide opportunities for mentoring, tutoring and academic support, positive social interaction, physical activity, and the chance to develop talents and interests.

In addition to this, 60% of low income families reported having varying degrees of trouble finding affordable after-school programs, with 40% reporting it as a major problem. 84% of non-low income individuals reported no problem in finding an affordable after-school program. These numbers reported from 2010 show an increasing trend since 2003, where only 20% of low income individuals reported affordable after-school programs as a major problem. Similarly, finding affordable recreational activities for teenagers is a much greater problem than in 2003 for all households.

In 2003, about 17% of all households said this was an issue. In 2003, about 30% of households with lower income found this to be a challenge, compared to 77% now.

Many youths are growing up alienated from relatives, neighbors, school, and the community which is often a result of poverty, single-parent families, and elevated levels of transience. According to the Bloomington Consolidated Plan (BCP) 2015-2019, page 108, part of the Anti-Poverty Strategy is "to provide access to information and emergency assistance to the most vulnerable elements of the community." BBBSSCI can play a strategic role with the challenges that poverty and other disadvantages may bring about. The Bigs with Badges initiative will provide a direct answer to these problems facing the youth in Monroe County and will give way to a transcendent campaign of revolution throughout Indiana.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

BBBSSCI seeks a one-time investment from the Jack Hopkins Social Service Funding to provide prevention and intervention for the participants of Bigs with Badges. This investment will provide funding for the pilot programs participants Bigs, who participate in pairings with local schools where they function as mentors based on shared interests, personality types, and goals for the relationship, with the children. Children in this program will work closely with Bigs with Badges in order to foster an improved relationship with officers in their community. The Big are required to eat lunch with their “Littles” once a week at the child's school also the Big Brothers Big Sisters staff will host monthly meet-ups for games and activities. When matched by BBBSSCI, they may continue to participate in Bigs with Badges, but may meet more frequently in other settings.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

While Monroe County is fortunate to have a wealth of productive opportunities for youth outside of school, not all youth have equal access to those opportunities. BBBS programming provides that access.

At any hour of the day, BBBSSCI is working hard to provide all the children facing adversity in Monroe County with an opportunity to change their lives for the better. In 2016, we served 217 children with our One-to-One mentoring programs and over 100 children in our First Friends group program. BBBSSCI is a mentoring program that pairs unrelated adult volunteers with children aged 5 to 18 years from single-parent households, free or reduced lunch, and children who have an incarcerated parent. Participants commit to meeting two or four times per month for 1 year. BBBS has an extensive infrastructure, including intense volunteer screening, match criteria, and ongoing supervision. BBBSSCI takes great care in the matching process to ensure the best match possible, maximizing the impact on each of our *Littles*. While we ask matches to commit to 1 year in our program, our average match length is 29 months, a true testament to the compatibility of our matches.

During each pre-match meeting, a *Big* and *Little* set goals for a Youth Development Plan which covers behavior, academics, relationships, and self-confidence. The Youth Development Plan is designed to help *Littles* become college-ready and develop a growth mindset. Two *Littles* graduates from Indiana University in 2015 and 2016. From 2014 – 2016, 98% of the *Littles* who graduated from high school were accepted into college.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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

Big Brothers Big Sisters

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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

We will measure our progress toward our goals by monitoring the number of matches through the information management system known as Matchforce. Not only does Matchforce store and help us track data, it also helps us manage day-to-day workload, providing queues (or work lists) that are aligned to our delivery of service. Because Matchforce is built on our Service Delivery Model, it is used in our work, from Customer Relations to Match Support, Core metrics and program scorecards, and support contact compliance and quality assurance.

Youth are given the YOS at the beginning of the match relationship and at the anniversary of their match. Youth and Mentors are given the SOR at the third month of their relationship and at the anniversary. Program staff meets on a weekly basis to annualize some of the following short term and long term data: Match support done, average match length, and retention rate. Outcome Areas: Educational success (social acceptance scholastic competence Educational Expectations Grades) Risk behaviors avoided/reduced: Attitudes toward risky behaviors Socio-emotional competency: (social acceptance, parent trust, special adult relationships)

Program Director meets with the Executive Director monthly to report on the match safety, outcomes, and strength of relationship.

BBBS understands there cannot be positive outcomes unless all match relationships are safe. In 2016 BBBSSCI completed 2,195 calls and in-person conversations to ensure the children in our program are safe and that our mentoring relationships are productive, healthy, and positive. In 2016 439 background checks were conducted on all volunteers.

We are committed to transparent accountability for our outcomes, holding ourselves accountable for each child in our program achieving results in three outcome areas: 1. Higher aspirations, greater confidence, and better relationships, 2. Avoidance of risky behaviors, and 3. Educational success.

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.

Big Brothers Big Sisters

The success of our One-to-One mentoring program is attributable in part to the trained professional Match Support Specialists who keep the matches active, positive, and beneficial for both the Big and the Little. Our Match Support Specialists are required to meet the below qualifications:

- Match Support Specialist have a Bachelors of Science or Bachelors of Arts degree and related casework experience. - MSS are able to develop public contact and communication skills. MSS demonstrate effective organizational, written and verbal skills. MSS represent the agency in a professional manner and demonstrate initiative, responsibility and accountability. -MSS are mature, flexible, convey warmth and acceptance, and establish rapport with clients and volunteers.

Match Support Specialists conduct child and parent interviews, screen volunteers, supervise volunteer and family enrollment and match process, supervise active matches, prepare and modify case plan goals, complete monthly follow up reports, participate in in-service trainings, and recruit prospective volunteers. Our program match support team has a combined 20 years of experience, and our agency staff has 62 years of experience with BBBS. These staff members are the heartbeat of the agency, and keep all of the matches running smoothly and effectively.

We were identified by the NLC as a recipient of the BBBSA Quality Award. The Quality Award is award to a BBBS agency who provides high-quality programming for the children we serve.

Volunteers are another critical component of the successful implementation of the program. Potential volunteers are recruited, screened, trained, and specifically matched with a child they will most likely be able to develop a positive relationship with based on mutual interests, personalities, and other factors.

Big Brothers Big Sisters has been serving Monroe County since 1973, and has been actively supporting positive mentoring matches since then. We began with 1 program for a small group of children and dedicated volunteers, and have grown to 3 core programs, multiple community collaborations, an Indiana University Big Brothers Big Sisters program, and almost 600 children and volunteers a year. We are an organization with our eye on the future, constantly looking for ways to reach more children, to enhance the support that we offer to our current Littles, and to involve the local community. The Youth Outcome Surveys, Strength of Relationship Surveys, and Harris Institute numbers demonstrate that our programs are effective in enhancing the lives of local youth, with positive impacts that last from childhood through adulthood.

Big Brother Big Sister volunteers listen to their Littles, they expose them to positive activities and opportunities. Big Brother Big Sister volunteers show Littles they care through actions, not advice, they are an anchor not a hero. Mentors create a web of support, a healthy supportive community for our Littles to call their own.

Simply put, BBBS programs work. Of all the steps Littles take in their journey, walking through our door are the ones they always remember. It is these steps that lead to a friend, a confidante, or someone that will inspire them. It is these steps that give them hope and a chance to dream bigger. It is these steps that help them see beyond the boundaries of their neighborhoods, beyond their ideas of what they are capable of achieving, and beyond the journey they imagined they'd be taking.

Big Brothers Big Sisters
Profit & Loss
 January through December 2018

| | Jan - Dec 18 |
|---|--------------|
| Ordinary Income/Expense | |
| Income | |
| 3800 · Fund Raising | |
| 3240 · General Fundraising | 4,299.82 |
| 3817 · Corporate Sponsor (was 7302) | 46,708.66 |
| 3865 · IU | 6,611.94 |
| 3800 · Fund Raising - Other | 219,118.05 |
| | 276,738.47 |
| 3700 · In-Kind Contributions | |
| 3705 · In-Kind Contributions - Other | 13,541.00 |
| 3710 · MC In-Kind Income | 18,204.91 |
| | 31,745.91 |
| 3300 · Indirect Contributions | |
| 3330 · Foundation & Misc Grants | 11,862.21 |
| 3310 · United Way of Monroe Co. | 28,396.32 |
| 3300 · Indirect Contributions - Other | 4,335.14 |
| | 44,593.67 |
| 3200 · Individual Contributions | |
| 3205 · Individual Donations | 11,252.38 |
| 3212 · ASK | 3,737.00 |
| 3230 · Employee Giving | 247.00 |
| 3211 · NAP Credits | 3,800.00 |
| 3200 · Individual Contributions - Other | 33,052.54 |
| | 52,088.92 |
| 3100 · Private Grants | 36,100.00 |
| 3000 · Government Grants | |
| 3035 · OJJDP 7 | 34,647.15 |
| 3080 · Owen County (Drug Free) | 1,000.00 |
| 3030 · Cares | 2,987.47 |
| 3000 · Government Grants - Other | 4,800.00 |
| | 43,434.62 |
| Total Income | 484,701.59 |
| Gross Profit | 484,701.59 |

Big Brothers Big Sisters
Profit & Loss
January through December 2018

| | Jan - Dec 18 |
|--|--------------|
| Expense | |
| 5000 · Equipment | |
| 5040 · Equipment Repairs & Maint. | 173.83 |
| 5030 · Computer Repairs & Support (Computer Repairs) | 7,077.96 |
| 5010 · Office Equipment, Furniture, & F | 1,519.86 |
| 5020 · Equipment Rental | 981.74 |
| | 9,753.39 |
| Total 5000 · Equipment | |
| 4500 · Occupancy | |
| 4900 · Utilities | |
| 4910 · Water | 393.38 |
| 4915 · Electric | 4,157.67 |
| 4920 · Telephone/Internet | 7,270.55 |
| | 11,821.60 |
| Total 4900 · Utilities | |
| 4520 · Household Supplies | 37.93 |
| 4510 · Building Expenses | 235.62 |
| 4501 · Building Rent | 22,000.00 |
| | 34,095.15 |
| Total 4500 · Occupancy | |
| 4000 · Payroll | |
| 4085 · Payroll Expenses | 329.50 |
| 4045 · Employee Health Ins. | 31,342.30 |
| 4031 · Unemployment Tax | 489.21 |
| 4030 · Payroll Tax - FICA | 18,312.42 |
| 4001 · Payroll Wage Expense | 239,360.24 |
| | 289,833.67 |
| Total 4000 · Payroll | |
| Federal Unemployment Tax | 0.00 |
| 5500 · Agency Expense | |
| 5550 · Food | 713.32 |
| 5675 · Miscellaneous | 96.68 |
| 5625 · Bank & Credit card fees | 3,570.52 |
| 5575 · Donations | 153.98 |
| 5600 · Dues and Subscriptions | 11,180.71 |
| | 15,715.21 |
| Total 5500 · Agency Expense | |
| 6000 · Insurance | |
| 6075 · Workmans Comp | 324.50 |
| 6025 · Liability Insurance | 5,412.89 |
| 6050 · Property & Liability Insurance | 3,831.42 |
| | 9,568.81 |
| Total 6000 · Insurance | |

3:14 PM
02/27/19
Accrual Basis

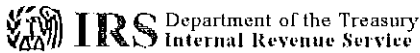
Big Brothers Big Sisters
Profit & Loss
January through December 2018

| | Jan - Dec 18 |
|--|--------------|
| 6100 · Program Expense | |
| 6105 · Program Consultants | 1,856.00 |
| 6135 · Bowl For Kids Sake Expenses | 2,435.47 |
| 6140 · Volunteer & Child Outreach | 311.12 |
| 6125 · Special Events Programming (Expenses for Fundraising Events) | 19,453.04 |
| 6150 · Development Expenses | 537.86 |
| 6175 · Jack Harlow Scholarship Fund | 500.00 |
| 6200 · Office Supplies | 2,860.20 |
| 6225 · Postage and Delivery | 1,266.51 |
| 6250 · Printing and Reproduction | 3,232.87 |
| 6275 · Advertising | 207.04 |
| 6300 · Mileage & Parking Reimbursement | 1,502.62 |
| 6325 · Miscellaneous Program Expenses | 0.00 |
| 6375 · Prizes & Awards | 500.00 |
| 6400 · Program Activities | 1,965.41 |
| 6100 · Program Expense - Other | 270.82 |
| | 36,898.96 |
| Total 6100 · Program Expense | |
| 7000 · Professional Fees | |
| 7025 · Bulk Mailing Service | 281.06 |
| 7050 · Accounting | 19,814.90 |
| 7000 · Professional Fees - Other | 3,569.00 |
| | 23,664.96 |
| Total 7000 · Professional Fees | |
| 7100 · Volunteer Expense | |
| 7125 · Volunteer Background Checks | 2,704.16 |
| | 2,704.16 |
| Total 7100 · Volunteer Expense | |
| 7200 · Board & Staff Expenses | |
| 7220 · Staff and Board Misc. | 631.97 |
| 7280 · Staff Development | 263.90 |
| | 895.87 |
| Total 7200 · Board & Staff Expenses | |
| 9025 · InKind Expenses | 31,745.91 |
| | 454,876.09 |
| Total Expense | |
| Net Ordinary Income | 29,825.50 |

3:14 PM
02/27/19
Accrual Basis

Big Brothers Big Sisters
Profit & Loss
January through December 2018

| | <u>Jan - Dec 18</u> |
|--------------------------------|-------------------------|
| Other Income/Expense | |
| Other Expense | |
| 9999 - Misc. Audit Adjustments | 0.00 |
| Total Other Expense | <u>0.00</u> |
| Net Other Income | <u>0.00</u> |
| Net Income | <u><u>29,825.50</u></u> |



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

Big Brothers Big Sisters

In reply refer to: 0248364798
Sep. 17, 2009 LTR 4168C E0
35-1330448 000000 00
00011240
BODC: TE

BIG BROTHERS BIG SISTERS OF MONROE
COUNTY INC
PO BOX 2534
BLOOMINGTON IN 47402-2534

014660

Employer Identification Number: 35-1330448
Person to Contact: Mr. Bayer
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your request of Sep. 08, 2009, regarding your tax-exempt status.

Our records indicate that a determination letter was issued in September 1975, that recognized you as exempt from Federal income tax, and discloses that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

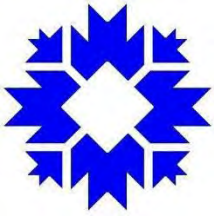
Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Michele M. Sullivan, Oper. Mgr.
Accounts Management Operations I



CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION

AGENCY CONTACT INFORMATION

Lead Agency Name: Boys & Girls Clubs of Bloomington (BGCB)

Address: PO Box 1716, 803 N. Monroe Street, Bloomington, IN 47402

Phone: 812-332-5311

E-Mail: labshier@bgcbloomington.org

Website: www.bgcbloomington.org

President of Board of Directors: Robert Babcock

Name of Executive Director: Jeff Baldwin

Phone: 812-332-5311 ex. 212

E-Mail: jbaldwin@bgcbloomington.org

Name and Title of Person to Present Proposal to the Committee: Jeff Baldwin, Executive Director

Phone: 812-332-5311 ex. 212

E-Mail: jbaldwin@bgcbloomington.org

Name of Grant Writer: Leslie Abshier

Phone: 812-332-5311 ex. 213

E-Mail: labshier@bgcbloomington.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 23 | 103 | 503 |

AGENCY 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. Our programs and services are designed to build character and strengthen life skills while providing hope and opportunity through accessible programming made possible by low membership dues (\$20/year), free transportation from school to club sites, and free programming offerings such as Cooking Club, Drama Club, Indiana's Kids Tutoring, and Fencing to name a few. We are meeting the needs of our community by providing a well rounded afterschool opportunity that supports the goals of our city and the needs of its' parents.

PROJECT INFORMATION

Project Name: Ferguson Crestmont Club & Community Outdoor Recreation Space Site Preparation

Total cost of project: **Approximately \$165,000.00+** : This estimate includes the equipment and installation of the new playground (\$90,000.00), freight of the equipment, outdoor items such as picnic tables, stage, etc., and site preparation to complete the entire outdoor recreation space.

Requested amount of JHSSF funding: **\$18,717.00** , for site prep only.

Total number of City residents anticipated to be served by this project in 2019: 600+

Total number of clients anticipated to be served by this project in 2019:

In 2018, the Ferguson Crestmont Club served 446 kids. We believe this playground, when finished, will everyday, weather permitting, be used at minimum by those roughly 450 members of the Ferguson Crestmont Boys & Girls Club. We also believe that number will grow in 2019, as 2018 was the first full year the Ferguson Crestmont Club operated in the new building. The playground will also be open to ALL youth and community members when it is completed as it will not be secured with a locked gate. .

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

The Boys & Girls Clubs of Bloomington is requesting \$18,717.00 to cover costs for the site preparation for a new outdoor recreational space at the Ferguson Crestmont Club that will be utilized but its' members and the community in the Crestmont neighborhood. This project includes putting foundational work (excavation and concrete work) down for a brand new playground to be enjoyed by BGCB members and community youth as well.

Site preparation includes removal of 7" of topsoil/fill where the playground will be constructed. The excavation depth allows for installation of a 'safe-fall' substrate. A short retaining wall, made from poured concrete, will be installed to account for sloping terrain. Additional safety site prep requirements will be completed as part of this project, to ensure that the new playground and recreation space can be installed.

Address where project will be housed: 1111 W 12th 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 to capital improvements to real estate and if you do not own the property at which the project 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.

We are currently in the process of obtaining a building permit from the appropriate authorities at the Monroe County Building Department.

Note: Funds will not be disbursed until all requisite variances or approvals are obtained.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (Please indicate source, amount, and whether confirmed or pending):

Jack Hopkins funding is part of a larger overall outdoor plan for the Crestmont Ferguson Club. Members of The Bloomington Rotary Club contributed \$50,000 and the Bloomington Rotary Club matched their donations to provide BGCB a total donation of \$100,000 for the playground equipment itself. This was to celebrate the centennial anniversary of the Rotary Clubs in Bloomington. These funds are secured at this time. There is potential funding being pursued through the CreatINg Places grant as well, but this has not yet been secured and is in the early stages of the planning process. This could provide up to \$50,000 for beautification of the space including landscaping, picnic tables, climbing sculptures, murals, a small stage,

other public art and/or music and performance space or public use music making devices. There is also some funding that is being pursued to help make the space as accessible as possible, which will depend on what we are able to do with the site plan. This is also still pending. Jack Hopkins funding will be a critical part of this overall project by providing the site prep for space.

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

We intend to build the new playground by November 2019. Before we can build a playground this necessary site preparation/excavation will need to be completed prior. Claims for this grant would be submitted no later than December 1, 2019.

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

This funding is not reliant on any potential or pending funding as it will be a first step in this project. Funds for the playground equipment and installation are secured, and we have finalized the equipment and installation invoice for this portion of the project already. Jack Hopkins funding will allow us to proceed with the project by covering costs associated with site prep prior to installation. A local company will perform site prep work.

FISCAL LEVERAGING (100 words or less)

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

Currently, we are working with our local Patronicity coordinator to utilize their crowd-sourcing and matching funds program initiative to receive the CreatING Places grant. Funds from this JHSS grant would be used toward the 1:1 matching fund program up to \$50,000. This would jump start the public campaign and encourage others to join with Jack Hopkins to fund the completion of the larger outdoor recreation and beautification plan. Jack Hopkins funds would also help us leverage other potential accessibility funding. The Bloomington Rotary Club members will be assisting with final site clean-up and a ribbon cutting ceremony when the playground is complete.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, will you be able to proceed with partial funding?

Yes No

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

| | Item | Cost |
|------------------------|--|--------------------|
| Priority #1 | Site prep for new playground including excavation and a retaining wall. | \$18,717.00 |
| Priority #2 | | |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$18,717.00 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2012 **SCAN** study explains that the economic and social challenges faced by many of Monroe County’s youth limits their access to arts programs, education, and sports groups: “Access to appropriate health services and promoting healthy habits in youth and teens is critical to preventing chronic health conditions...almost half of children and teens age 6 to 17 are engaged in less than 5 days of vigorous activity in a week.” We are addressing Strategy 4 and 5 of the 2015-19 City of Bloomington Consolidated Plan: The BGCB is a community resource working to create a better quality of life for all citizens of Bloomington. According to the 2015-19 City of Bloomington Consolidated Plan, BGCB is addressing all items of Strategy 5, as we serve low income individuals/families, provide a safety net for community members in need, and provide valuable services to improve quality of life. Our program addresses “Anti Poverty Strategy #4” (91.215j) through “goals/policies that aim to reduce the number of poverty level families by providing resource to overcome poverty and by meeting a priority non-housing community need through youth services”. Furthermore, as listed in Strategy 4, BGCB will “continue to cooperate with other local funders on anti-poverty strategies, such as the United Way of Monroe County”.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

This project is a one-time investment into the foundational development of a new playground space for our Ferguson Crestmont Club members and the neighborhood's youth and families. We intend to build a long lasting and sustainable structure/area that will last for many years. We believe that solid foundational and site preparation work, along with a good site plan, will ensure the playground's long-life.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Play is important to the social and physical development of youth, and safe play should be accessible to all of our youth. According to the American Council on Exercise, obesity in youth ages 6-19 has almost quadrupled since the late 1960s and youth that have access and programming to foster physical recreation are more likely to develop a healthier lifestyle. By spending extra time on the playground or participating in a sport, children reap the same benefits resulting in more focus at school and better outlook on relationships and school overall. Physical activity will prevent youth from becoming obese or help them lose weight, as well as teach them healthy habits that can last a lifetime. Playgrounds aren't only for fun, but help youth and caregivers develop relationships in safe environments. Additional benefits will be realized when neighborhood children and families begin to use the equipment, which will bring people to the Club site who otherwise may have not come to the Club. Developing a Community Center model continues to be a top priority for BGCB.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 affected by your initiative), the data we seek are the short-term indicators used to measure the change your program has created during the period of your funding

agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

To promote healthy lifestyles, the Ferguson Crestmont Club offers several programs that focus on nutrition and fitness: Cooking Club, Garden Club, Dance Club, cycling, sports, Triple Play, and tobacco and substance abuse prevention programs. While members participated in a great deal of healthy lifestyles programs last year, the new Ferguson Crestmont Club offers great opportunity for expansion including this outdoor space. According to the Annie E Casey Kids Count Database, in 2012 it was reported that 32% of Indiana youth ages 10-17 are obese - slightly above the national average. With this in mind, the Ferguson Crestmont Club will continue to promote creative healthy lifestyles for its members. Annually we collect qualitative data from members through the National Youth Outcome Initiative to gauge youth input. BGCB will track daily youth attendance and total number of youth served annually, and this number will serve as our base understanding of the minimum number of youth served as we will be unable to track usage by community members outside of BGCB program time.

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.

The Boys & Girls Clubs of Bloomington is thankful for the continued support from the Jack Hopkins Social Service Grant and the opportunities it has provided to our most vulnerable citizens. We believe that this opportunity will benefit thousands of youth for years to come. As BGCB has expanded its capacity in the Crestmont Neighborhood, we could not have done so without the assistance of the Jack Hopkins funding we have received over the last several years. Over 130 youth, each and every day, access Ferguson Crestmont Club programming. With continued program development we will see 200+ youth daily by the end of 2019. Thank you for joining us as we bring this world class playground to the whole Crestmont Community.

Club youth were involved in choosing the playground and outdoor space layout from three different plans and designs. Members voted on their preferred option, giving them more buy-in to the final plan and creating excitement about this additional Club space to come. We successfully completed the indoor space at the Ferguson Crestmont Club to be used to its fullest potential. This outdoor project allows us broaden and expand the kind of programming we can offer to youth in this location. It also contributes to the overall neighborhood by beautifying the building and providing an outdoor space for community use.

| | | |
|--|---------------------|------------------|
| Boys & Girls Clubs of Bloomington | | |
| Proposed budget | | |
| Jack Hopkins Social Service Funding | | |
| | | |
| Item | Expense | |
| Full excavation of site, removal of debris, concrete work, and site prep for future playground. | \$18,717.00 | Invoice received |
| <i>Total request from JHSSG</i> | <i>\$18,717.00</i> | |
| | | |
| Additional projected expenses: | | |
| Playground equipment and installation | \$90,521.00 | Invoice received |
| Freight of playground equipment | \$10,000.00 | |
| Additional project equipment including picnic tables, benches, etc. | \$20,000.00 | |
| Outdoor art installations | \$8,000.00 | |
| <i>Estimated total cost at this time for entire project.</i> | <i>\$165,955.00</i> | |



WEDDLE BROS. BUILDING GROUP, LLC

A Weddle Bros. Construction Company

100% Employee Owned

TO: Jeff Baldwin
JOB NAME: BGC Crestmont - Playground retaining wall
JOB LOCATION: 803 N. Monroe St., Bloomington, IN
ARCHITECT/ENGINEER: NA

DATE: April, 1, 2019
PLANS AND SPECIFICATIONS DATED: Playworld dated 03/26/2019
ADDENDA: NA
PAYMENT TERMS: 30 days

FULL DESCRIPTION OF LABOR AND MATERIALS COVERED BY THIS PROPOSAL:

Base Bid Scope of Work:

1. Supervision, Layout.
2. Take section of the existing fence out for access.
3. Lay down plywood to protect the existing concrete.
4. Excavate 7.5" top soil and dirt, Haul off the spoils
5. Excavate for retaining wall footer for the new retaining wall, Haul off the spoils.
6. Bank pour concrete retaining wall footer.
7. Form and pour concrete retaining wall. Retaining wall to be constructed with 1" PVC weeps equally spaced the east/west length of the wall. Filter fabric to be placed on the inside of the retaining wall in the areas of the weeps.
8. Wreck forms, backfill and install fencing that was taken down for access
9. Place top soil, seed and straw around the north side of the new retaining wall and any effected area
10. Continuous Clean-up and debris removal.

Price:-----\$18,717.00

Qualifications:

1. All work to be completed during normal working hours Monday through Friday from 7:00 am to 3:30 pm.

Exclusions:

- Supply and placement of stone
- Supply and placement of playground surface and equipment.
- Design & Engineering
- Inspections
- Jobsite Fence
- Toilets
- Permits
- Signage
- Testing

ACCEPTED _____

FIRM NAME

BY _____

BY  _____

Jeff Bex

DATE _____

This proposal is subject to revision if not accepted in writing within 30 days after the date hereon.

Boys & Girls Club of Bloomington

Profit & Loss Budget Performance

January through December 2018

| | Jan - Dec 18 | Budget | Jan - Dec 18 |
|---------------------------------|--------------|------------|--------------|
| Ordinary Income/Expense | | | |
| Income | | | |
| Auxiliary Funding | 75,000.00 | 75,000.00 | 75,000.00 |
| Special Events | | | |
| Smart Girl, Strong Women | 55,030.28 | 60,000.00 | 55,030.28 |
| Man Up to Make a Difference | 83,593.28 | 70,000.00 | 83,593.28 |
| Lemonade Day | 44,077.00 | 60,000.00 | 44,077.00 |
| Father Daughter Dance | 6,437.48 | 10,000.00 | 6,437.48 |
| Club Heroes Golf Outing | 24,008.74 | 30,000.00 | 24,008.74 |
| Other Fundraising Events Income | 6,330.22 | 15,000.00 | 6,330.22 |
| Special Events - Other | 200.00 | 200.00 | 200.00 |
| Total Special Events | 219,677.00 | 245,000.00 | 219,677.00 |
| Contributions | | | |
| Our Kids 2019 | 620.00 | | 620.00 |
| Big Hearts 2018 | 55,136.31 | 60,000.00 | 55,136.31 |
| Big Hearts 2017 | 5,829.32 | 0.00 | 5,829.32 |
| Our Kids 2018 | 169,597.15 | 250,000.00 | 169,597.15 |
| Our Kids 2017 | 13,370.91 | | 13,370.91 |
| Major Gift Initiative | 49,000.00 | 135,000.00 | 49,000.00 |
| Bequests/Memorials | 3,135.00 | 5,000.00 | 3,135.00 |
| Civic Groups | 18,019.65 | 40,000.00 | 18,019.65 |
| Individual Donations | 317,532.80 | 175,000.00 | 317,532.80 |
| Corporate Donations | 264,288.47 | 155,000.00 | 264,288.47 |
| Total Contributions | 896,529.61 | 820,000.00 | 896,529.61 |
| Fees | | | |
| Camp Rock Fees | 124,641.00 | 126,000.00 | 124,641.00 |
| Camps-Clubs | 83,088.09 | 80,000.00 | 83,088.09 |
| Facility Rental | 67,734.23 | 65,000.00 | 67,734.23 |
| Memberships | 23,065.00 | 20,000.00 | 23,065.00 |
| Total Fees | 298,528.32 | 291,000.00 | 298,528.32 |
| Grants | | | |
| Foundations | 3,000.00 | | 3,000.00 |
| State | 256,855.49 | 319,000.00 | 256,855.49 |
| Local - City/County | 144,311.03 | 100,000.00 | 144,311.03 |
| Federal/National | 29,196.67 | 40,000.00 | 29,196.67 |
| Total Grants | 433,363.19 | 459,000.00 | 433,363.19 |

Boys & Girls Club of Bloomington

Profit & Loss Budget Performance

January through December 2018

12:56 PM
03/18/19
Cash Basis

| | Jan - Dec 18 | Budget | Jan - Dec 18 |
|--|------------------|--------------|------------------|
| Other Income | | | |
| Income in Endowment Fund | 2,500.00 | | 2,500.00 |
| Income in Community Foundation | 13,680.00 | | 13,680.00 |
| Interest | 42.96 | | 42.96 |
| Total Other Income | <u>16,222.96</u> | | <u>16,222.96</u> |
| Total Income | 1,939,321.08 | 1,890,000.00 | 1,939,321.08 |
| Gross Profit | 1,939,321.08 | 1,890,000.00 | 1,939,321.08 |
| Expense | | | |
| Resource Development | | | |
| Fundraising Special Events | | | |
| Man Up to Make Difference | 4,734.25 | 5,000.00 | 4,734.25 |
| Smart Girls Strong Women | 4,684.61 | 5,000.00 | 4,684.61 |
| Lemonade Day | 17,164.78 | 20,000.00 | 17,164.78 |
| Father Daughter Dance | 1,171.31 | 3,000.00 | 1,171.31 |
| Club Heroes Golf Outing | 4,732.99 | 4,600.00 | 4,732.99 |
| Other Special Fundraise-Events | 288.62 | | 288.62 |
| Fundraising Special Events - Other | 24,232.04 | | 24,232.04 |
| Total Fundraising Special Events | 57,008.60 | 37,600.00 | 57,008.60 |
| Supplies Copier Printing Mail | | | |
| Our Kids & Big Heart-Supplies | 1,757.07 | 3,000.00 | 1,757.07 |
| End of Year-Mailing & Supplies | 6,303.43 | 2,000.00 | 6,303.43 |
| Other Mailing, Postage, Supply | 324.61 | 5,000.00 | 324.61 |
| Supplies Copier Printing Mail - Other | 3,451.09 | | 3,451.09 |
| Total Supplies Copier Printing Mail | 11,836.20 | 10,000.00 | 11,836.20 |
| Cultivation/Stewardship | | | |
| Cultivation/Stewardship - Other | 765.76 | | 765.76 |
| Eat, Thank, Love | 7,541.03 | 4,500.00 | 7,541.03 |
| Food, Travel, Mailing, Supplies | 6,444.41 | 3,000.00 | 6,444.41 |
| Cultivation/Stewardship - Other | 1,387.16 | 2,500.00 | 1,387.16 |
| Total Cultivation/Stewardship | 16,138.36 | 10,000.00 | 16,138.36 |
| Marketing, Advertising & Dues | 12,880.79 | 15,130.00 | 12,880.79 |
| Software, Licenses & Fees (RD) | 3,196.02 | 4,020.00 | 3,196.02 |
| Total Resource Development | 101,059.97 | 76,750.00 | 101,059.97 |

Boys & Girls Club of Bloomington
Profit & Loss Budget Performance
January through December 2018

| | Jan - Dec 18 | Budget | Jan - Dec 18 |
|------------------------------------|-------------------|-------------------|-------------------|
| Club and Camp Expenses | | | |
| Camp Rock Expenses | 9,203.09 | 11,000.00 | 9,203.09 |
| Program Fees-Camp Rock | 2,006.14 | 673.00 | 2,006.14 |
| Program Supplies-Camp Rock | 365.18 | 450.00 | 365.18 |
| Food-Camp Rock | 2,216.47 | 300.00 | 2,216.47 |
| Equipment & Repair-Camp Rock | 3,168.36 | 1,500.00 | 3,168.36 |
| Facility Maint.-Camp Rock | 575.00 | | 575.00 |
| Vehicle Expense-Camp Rock | 9,127.19 | 9,000.00 | 9,127.19 |
| RBB CSC Trans.-Camp Rock | 1,339.86 | 2,094.00 | 1,339.86 |
| Staff Food & Training-Camp Rock | 145.61 | 283.00 | 145.61 |
| Awards/Recognition-Camp Rock | 133.75 | 200.00 | 133.75 |
| Supplies Copier Printing Mail | 3,228.00 | 3,320.00 | 3,228.00 |
| Software, Licenses & Fees Cam R | 498.25 | 650.00 | 498.25 |
| Advertising-Camp Rock | 4,078.91 | 3,901.00 | 4,078.91 |
| Utilities-Camp Rock | | | |
| Total Camp Rock Expenses | 36,085.81 | 33,371.00 | 36,085.81 |
| Ellettsville Expenses | | | |
| Professional Fees | 2,499.99 | | 2,499.99 |
| Program Fees-Ellettsville | 9,768.30 | 27,879.00 | 9,768.30 |
| Program Supplies-Ellettsville | 12,164.94 | 2,500.00 | 12,164.94 |
| Food-Ellettsville | 647.05 | 1,875.00 | 647.05 |
| Snacks-Ellettsville | 116.26 | 5,000.00 | 116.26 |
| Equipment & Repair-Ellettsville | 2,174.10 | 300.00 | 2,174.10 |
| Facility Maint.-Ellettsville | 55.55 | 300.00 | 55.55 |
| Vehicle Expense-Ellettsville | 1,972.88 | 10,255.00 | 1,972.88 |
| RBB CSC Trans.-Ellettsville | 0.00 | 1,825.00 | 0.00 |
| Staff Food & Training-Elletts | 9,487.22 | 18,942.00 | 9,487.22 |
| Club Gear-Ellettsville | 772.10 | 920.00 | 772.10 |
| Awards/Recognition-Ellettsville | 185.96 | 283.00 | 185.96 |
| Supplies Copier Printing Mail | 7,151.74 | 665.00 | 7,151.74 |
| Office Equipment & Hardware-EV | 0.00 | 1,200.00 | 0.00 |
| Software, Licenses & Fees EV | 31,681.98 | 19,505.00 | 31,681.98 |
| 21st CCLC Expenses | 20,680.29 | 15,750.00 | 20,680.29 |
| Utilities-Ellettsville | 1,949.86 | 1,861.00 | 1,949.86 |
| Total Ellettsville Expenses | 101,308.22 | 109,060.00 | 101,308.22 |

Boys & Girls Club of Bloomington Profit & Loss Budget Performance January through December 2018

| | Jan - Dec 18 | Budget | Jan - Dec 18 |
|-------------------------------------|-------------------|-------------------|-------------------|
| Crestmont Expenses | | | |
| Program Fees-Crestmont | 5,888.22 | 5,500.00 | 5,888.22 |
| Programs Supplies-Crestmont | 5,545.93 | 3,500.00 | 5,545.93 |
| Food-Crestmont | 1,412.77 | 750.00 | 1,412.77 |
| Equipment & Repair-Crestmont | -350.94 | 500.00 | -350.94 |
| Facility Maint.-Crestmont | 14,496.71 | 18,720.00 | 14,496.71 |
| Vehicle Expense-Crestmont | 3,165.67 | 3,400.00 | 3,165.67 |
| Staff Food & Training-Crestmont | 2,317.89 | 2,300.00 | 2,317.89 |
| Club Gear-Crestmont | 876.20 | 1,350.00 | 876.20 |
| Awards/Recognition-Crestmont | 98.67 | 300.00 | 98.67 |
| Supplies Copier Printing Mail | 2,624.21 | 1,065.00 | 2,624.21 |
| Office Equipment & Hardware-CMT | 696.97 | | 696.97 |
| Software, Licenses & Fees CRM | 1,297.00 | 1,297.00 | 1,297.00 |
| Utilities-Crestmont | 26,450.61 | 22,540.00 | 26,450.61 |
| Crestmont Expenses - Other | 649.00 | | 649.00 |
| Total Crestmont Expenses | 65,168.91 | 61,222.00 | 65,168.91 |
| Lincoln Expenses | | | |
| Programs Fees-Lincoln | 8,090.68 | 3,500.00 | 8,090.68 |
| Programs Supplies-Lincoln | 3,488.28 | 3,500.00 | 3,488.28 |
| Food-Lincoln | 478.55 | 300.00 | 478.55 |
| Equipment & Repair-Lincoln | 823.64 | 300.00 | 823.64 |
| Facility Maint.-Lincoln | 4,891.28 | 2,540.00 | 4,891.28 |
| Vehicle Expense-Lincoln | 10,726.34 | 7,170.00 | 10,726.34 |
| RBBSC Trans.-Lincoln | 286.00 | | 286.00 |
| Staff Food & Training-Lincoln | 1,584.46 | 350.00 | 1,584.46 |
| Club Gear-Lincoln | 0.00 | 300.00 | 0.00 |
| Awards/Recognition-Lincoln | 484.79 | 400.00 | 484.79 |
| Supplies Copier Printing Mail | 3,080.57 | 1,238.00 | 3,080.57 |
| Office Equipment & Hardware-Lin | 88.44 | | 88.44 |
| Software, Licenses & Fees-Linco | 1,946.00 | 1,297.00 | 1,946.00 |
| Utilities-Lincoln | 14,822.96 | 18,852.00 | 14,822.96 |
| Rent-Lincoln | 12,600.00 | 25,200.00 | 12,600.00 |
| Total Lincoln Expenses | 63,391.99 | 64,947.00 | 63,391.99 |
| Total Club and Camp Expenses | 265,954.93 | 268,600.00 | 265,954.93 |
| Lincoln Street Relocation Exp. | 0.00 | | 0.00 |

Boys & Girls Club of Bloomington Profit & Loss Budget Performance January through December 2018

12:56 PM
03/18/19
Cash Basis

| | Jan - Dec 18 | Budget | Jan - Dec 18 |
|-------------------------------------|-------------------|-------------------|-------------------|
| Kenworthy Admin Center | | | |
| Audit and Tax Return | 9,175.00 | 9,000.00 | 9,175.00 |
| Professional & Legal | 0.00 | 1,000.00 | 0.00 |
| Property Taxes | 4,832.24 | 2,800.00 | 4,832.24 |
| Youth of the Year | 247.11 | 550.00 | 247.11 |
| Facility Maint., Admin | 3,599.72 | 1,500.00 | 3,599.72 |
| Vehicle Expense | 282.22 | 500.00 | 282.22 |
| Supplies Copier Printing Mail | 28.48 | | 28.48 |
| Staff Food & Training-Admin | 1,917.72 | 2,200.00 | 1,917.72 |
| Supplies Copier Printing, Mail | 14,366.63 | 8,768.00 | 14,366.63 |
| Office Equipment & Hardware-Adm | 2,737.88 | 3,100.00 | 2,737.88 |
| Software, License, Fees-Admin | 2,890.26 | 2,188.00 | 2,890.26 |
| Advertising-Admin | 756.79 | 500.00 | 756.79 |
| Board of Directors Expense | 11,626.93 | 11,000.00 | 11,626.93 |
| Payment Processing Fees | 16,529.04 | 16,000.00 | 16,529.04 |
| Payment Late Fees & Interest,Es | 390.40 | 100.00 | 390.40 |
| Background Checks | 4,326.12 | 2,400.00 | 4,326.12 |
| Utilities-Admin | 16,794.17 | 11,500.00 | 16,794.17 |
| Insurance | | | |
| Director + Officers | 1,757.00 | 1,757.00 | 1,757.00 |
| Business Auto | 852.00 | 852.00 | 852.00 |
| Commercial Umbrella | 657.00 | 657.00 | 657.00 |
| Workers' Comp | 8,594.00 | 5,564.00 | 8,594.00 |
| Commercial Package | 28,994.00 | 26,003.00 | 28,994.00 |
| Total Insurance | 40,854.00 | 33,324.00 | 40,854.00 |
| Dues | | | |
| State | 3,371.00 | 3,350.00 | 3,371.00 |
| Local | 1,595.10 | 1,300.00 | 1,595.10 |
| National | 7,160.00 | 6,700.00 | 7,160.00 |
| Total Dues | 12,126.10 | 11,350.00 | 12,126.10 |
| Professional Dev. & Cult.-Admin | 250.20 | | 250.20 |
| Total Kenworthy Admin Center | 143,731.01 | 117,780.00 | 143,731.01 |
| Program Fees | 11.00 | | 11.00 |
| Utilities old account | | | |
| Fire & Security | 0.00 | | 0.00 |
| Electricity | 0.00 | | 0.00 |
| Gas | 0.00 | | 0.00 |
| Water/Sewer | 0.00 | | 0.00 |
| Total Utilities old account | 0.00 | | 0.00 |

Boys & Girls Club of Bloomington Profit & Loss Budget Performance January through December 2018

| | Jan - Dec 18 | Budget | Jan - Dec 18 |
|---------------------------------|---------------------|---------------------|---------------------|
| Payroll Taxes | | | |
| Social Security | 67,380.09 | 74,893.00 | 67,380.09 |
| Medicare | 15,795.27 | 17,515.00 | 15,795.27 |
| Payroll Taxes - Other | 1,595.35 | | 1,595.35 |
| Total Payroll Taxes | <u>84,770.71</u> | <u>92,408.00</u> | <u>84,770.71</u> |
| Staffing Expenses | | | |
| 401K Admin Expenses | 4,179.23 | 3,600.00 | 4,179.23 |
| ADP Payroll Fees | 10,212.81 | 8,600.00 | 10,212.81 |
| Staffing IU Work Study | 5,504.05 | 4,250.00 | 5,504.05 |
| Staffing AmeriCorps & VISTA | 44,834.06 | 22,612.00 | 44,834.06 |
| Unemployment Compensation | 2.10 | | 2.10 |
| Payroll | | | |
| Camp Rock | 63,817.07 | 80,348.00 | 63,817.07 |
| Administrative Staff | 341,951.48 | 326,120.00 | 341,951.48 |
| Camp | 0.00 | 0.00 | 0.00 |
| Lincoln Street Unit | 253,015.26 | 205,211.00 | 253,015.26 |
| Ellettsville Unit | 232,674.45 | 322,731.00 | 232,674.45 |
| Crestmont Unit | 228,341.48 | 270,550.00 | 228,341.48 |
| Support Staff | 170.00 | | 170.00 |
| Professional Staff. | 0.00 | 20,000.00 | 0.00 |
| Payroll - Other | 2,692.16 | | 2,692.16 |
| Total Payroll | <u>1,122,661.90</u> | <u>1,224,960.00</u> | <u>1,122,661.90</u> |
| Benefits | | | |
| Healthy Lifestyle Reimbursement | 1,143.97 | 3,600.00 | 1,143.97 |
| Health & Life Insurance | 67,355.25 | 49,500.00 | 67,355.25 |
| Retirement | 0.00 | 12,000.00 | 0.00 |
| Total Benefits | <u>68,499.22</u> | <u>65,100.00</u> | <u>68,499.22</u> |
| Total Staffing Expenses | <u>1,255,893.37</u> | <u>1,329,122.00</u> | <u>1,255,893.37</u> |
| Total Expense | <u>1,851,420.99</u> | <u>1,884,660.00</u> | <u>1,851,420.99</u> |
| Net Ordinary Income | 87,900.09 | 5,340.00 | 87,900.09 |
| Other Income/Expense | | | |
| Other Income | | | |
| Capital Campaign | | | |
| Big Futures | 793,753.63 | | 793,753.63 |
| Capital Campaign Interest | 5.29 | | 5.29 |
| Total Capital Campaign | <u>793,758.92</u> | | <u>793,758.92</u> |

Boys & Girls Club of Bloomington
Profit & Loss Budget Performance
 January through December 2018

12:56 PM
 03/18/19
 Cash Basis

| | Jan - Dec 18 | Budget | Jan - Dec 18 |
|--|---------------------|-----------------|---------------------|
| Temporarily Restricted Income | | | |
| Crestmont Fund St. John | 2,300.00 | | 2,300.00 |
| Scholarships Camp Rock | 2,600.00 | | 2,600.00 |
| LOKPAP Income | 5,000.00 | | 5,000.00 |
| Camping Expedition Funds | 15,500.00 | | 15,500.00 |
| Interest Income Restricted | 40.14 | | 40.14 |
| Total Temporarily Restricted Income | 25,440.14 | | 25,440.14 |
| Lincoln Remodel Fund | 4,375,590.98 | | 4,375,590.98 |
| Total Other Income | 5,194,790.04 | | 5,194,790.04 |
| Other Expense | | | |
| Lincoln Remodel Utilities | 12,201.86 | | 12,201.86 |
| Capital Campaign Expenses | | | |
| CC Miscellaneous Expense | 2,556.96 | | 2,556.96 |
| Interest ONB Loan | 39,562.46 | | 39,562.46 |
| Total Capital Campaign Expenses | 42,119.42 | | 42,119.42 |
| Temporarily Restricted Expenses | | | |
| Scholarships Camp Rock | 4,500.00 | | 4,500.00 |
| Teens | 85.43 | | 85.43 |
| Various Temporary Expenses | 3,966.53 | | 3,966.53 |
| Total Temporarily Restricted Expenses | 8,551.96 | | 8,551.96 |
| Total Other Expense | 62,873.24 | | 62,873.24 |
| Net Other Income | 5,131,916.80 | | 5,131,916.80 |
| Net Income | 5,219,816.89 | 5,340.00 | 5,219,816.89 |

Boys & Girls Club of Bloomington
Profit & Loss Budget Performance
 January through December 2018

12:56 PM
 03/18/19
 Cash Basis

| | YTD Budget | Annual Budget |
|---------------------------------|------------|---------------|
| Ordinary Income/Expense | | |
| Income | | |
| Auxiliary Funding | 75,000.00 | 75,000.00 |
| Special Events | | |
| Smart Girl, Strong Women | 60,000.00 | 60,000.00 |
| Man Up to Make a Difference | 70,000.00 | 70,000.00 |
| Lemonade Day | 60,000.00 | 60,000.00 |
| Father Daughter Dance | 10,000.00 | 10,000.00 |
| Club Heroes Golf Outing | 30,000.00 | 30,000.00 |
| Other Fundraising Events Income | 15,000.00 | 15,000.00 |
| Special Events - Other | | |
| Total Special Events | 245,000.00 | 245,000.00 |
| Contributions | | |
| Our Kids 2019 | 60,000.00 | 60,000.00 |
| Big Hearts 2018 | 0.00 | 0.00 |
| Big Hearts 2017 | 250,000.00 | 250,000.00 |
| Our Kids 2018 | | |
| Our Kids 2017 | 135,000.00 | 135,000.00 |
| Major Gift Initiative | 5,000.00 | 5,000.00 |
| Bequests/Memorials | 40,000.00 | 40,000.00 |
| Civic Groups | | |
| Individual Donations | 175,000.00 | 175,000.00 |
| Corporate Donations | 155,000.00 | 155,000.00 |
| Total Contributions | 820,000.00 | 820,000.00 |
| Fees | | |
| Camp Rock Fees | 126,000.00 | 126,000.00 |
| Camps-Clubs | 80,000.00 | 80,000.00 |
| Facility Rental | 65,000.00 | 65,000.00 |
| Memberships | 20,000.00 | 20,000.00 |
| Total Fees | 291,000.00 | 291,000.00 |
| Grants | | |
| Foundations | | |
| State | 319,000.00 | 319,000.00 |
| Local - City/County | 100,000.00 | 100,000.00 |
| Federal/National | 40,000.00 | 40,000.00 |
| Total Grants | 459,000.00 | 459,000.00 |

Boys & Girls Club of Bloomington
Profit & Loss Budget Performance
 January through December 2018

12:56 PM
 03/18/19
 Cash Basis

| | YTD Budget | Annual Budget |
|--|--------------|---------------|
| Other Income | | |
| Income in Endowment Fund | | |
| Income in Community Foundation | | |
| Interest | | |
| Total Other Income | 1,890,000.00 | 1,890,000.00 |
| Total Income | 1,890,000.00 | 1,890,000.00 |
| Gross Profit | 1,890,000.00 | 1,890,000.00 |
| Expense | | |
| Resource Development | | |
| Fundraising Special Events | | |
| Man Up to Make Difference | 5,000.00 | 5,000.00 |
| Smart Girls Strong Women | 5,000.00 | 5,000.00 |
| Lemonade Day | 20,000.00 | 20,000.00 |
| Father Daughter Dance | 3,000.00 | 3,000.00 |
| Club Heroes Golf Outing | 4,600.00 | 4,600.00 |
| Other Special Fundraise-Events | | |
| Fundraising Special Events - Other | | |
| Total Fundraising Special Events | 37,600.00 | 37,600.00 |
| Supplies Copier Printing Mail | | |
| Our Kids & Big Heart-Supplies | 3,000.00 | 3,000.00 |
| End of Year-Mailing & Supplies | 2,000.00 | 2,000.00 |
| Other Mailing, Postage, Supply | 5,000.00 | 5,000.00 |
| Supplies Copier Printing Mail - Other | | |
| Total Supplies Copier Printing Mail | 10,000.00 | 10,000.00 |
| Cultivation/Stewardship | | |
| Cultivation/Stewardship - Other | | |
| Eat, Thank, Love | 4,500.00 | 4,500.00 |
| Food, Travel, Mailing, Supplies | 3,000.00 | 3,000.00 |
| Cultivation/Stewardship - Other | 2,500.00 | 2,500.00 |
| Total Cultivation/Stewardship | 10,000.00 | 10,000.00 |
| Marketing, Advertising & Dues | 15,130.00 | 15,130.00 |
| Software, Licenses & Fees (RD) | 4,020.00 | 4,020.00 |
| Total Resource Development | 76,750.00 | 76,750.00 |

Boys & Girls Club of Bloomington Profit & Loss Budget Performance January through December 2018

| | YTD Budget | Annual Budget |
|------------------------------------|-------------------|-------------------|
| Club and Camp Expenses | | |
| Camp Rock Expenses | | |
| Program Fees-Camp Rock | 11,000.00 | 11,000.00 |
| Program Supplies-Camp Rock | 673.00 | 673.00 |
| Food-Camp Rock | 450.00 | 450.00 |
| Equipment & Repair-Camp Rock | 300.00 | 300.00 |
| Facility Maint.-Camp Rock | 1,500.00 | 1,500.00 |
| Vehicle Expense-Camp Rock | | |
| RBBSC Trans.-Camp Rock | 9,000.00 | 9,000.00 |
| Staff Food & Training-Camp Rock | 2,094.00 | 2,094.00 |
| Awards/Recognition-Camp Rock | 283.00 | 283.00 |
| Supplies Copier Printing Mail | 200.00 | 200.00 |
| Software, Licenses & Fees Cam R | 3,320.00 | 3,320.00 |
| Advertising-Camp Rock | 650.00 | 650.00 |
| Utilities-Camp Rock | 3,901.00 | 3,901.00 |
| Total Camp Rock Expenses | 33,371.00 | 33,371.00 |
| Ellettsville Expenses | | |
| Professional Fees | | |
| Program Fees-Ellettsville | 27,879.00 | 27,879.00 |
| Program Supplies-Ellettsville | 2,500.00 | 2,500.00 |
| Food-Ellettsville | 1,875.00 | 1,875.00 |
| Snacks-Ellettsville | 5,000.00 | 5,000.00 |
| Equipment & Repair-Ellettsville | 300.00 | 300.00 |
| Facility Maint.-Ellettsville | 300.00 | 300.00 |
| Vehicle Expense-Ellettsville | 10,255.00 | 10,255.00 |
| RBBSC Trans.-Ellettsville | 1,825.00 | 1,825.00 |
| Staff Food & Training-Elletts | 18,942.00 | 18,942.00 |
| Club Gear-Ellettsville | 920.00 | 920.00 |
| Awards/Recognition-Ellettsville | 283.00 | 283.00 |
| Supplies Copier Printing Mail | 665.00 | 665.00 |
| Office Equipment & Hardware-EV | 1,200.00 | 1,200.00 |
| Software, Licenses & Fees EV | 19,505.00 | 19,505.00 |
| 21st CCLC Expenses | 15,750.00 | 15,750.00 |
| Utilities-Ellettsville | 1,861.00 | 1,861.00 |
| Total Ellettsville Expenses | 109,060.00 | 109,060.00 |

Boys & Girls Club of Bloomington
Profit & Loss Budget Performance
 January through December 2018

| | YTD Budget | Annual Budget |
|-------------------------------------|-------------------|-------------------|
| Crestmont Expenses | | |
| Program Fees-Crestmont | 5,500.00 | 5,500.00 |
| Programs Supplies-Crestmont | 3,500.00 | 3,500.00 |
| Food-Crestmont | 750.00 | 750.00 |
| Equipment & Repair-Crestmont | 500.00 | 500.00 |
| Facility Maint.-Crestmont | 18,720.00 | 18,720.00 |
| Vehicle Expense-Crestmont | 3,400.00 | 3,400.00 |
| Staff Food & Training-Crestmont | 2,300.00 | 2,300.00 |
| Club Gear-Crestmont | 1,350.00 | 1,350.00 |
| Awards/Recognition-Crestmont | 300.00 | 300.00 |
| Supplies Copier Printing Mail | 1,065.00 | 1,065.00 |
| Office Equipment & Hardware-CMT | | |
| Software, Licenses & Fees CRM | 1,297.00 | 1,297.00 |
| Utilities-Crestmont | 22,540.00 | 22,540.00 |
| Crestmont Expenses - Other | | |
| Total Crestmont Expenses | 61,222.00 | 61,222.00 |
| Lincoln Expenses | | |
| Program Fees-Lincoln | 3,500.00 | 3,500.00 |
| Programs Supplies-Lincoln | 3,500.00 | 3,500.00 |
| Food-Lincoln | 300.00 | 300.00 |
| Equipment & Repair-Lincoln | 300.00 | 300.00 |
| Facility Maint.-Lincoln | 2,540.00 | 2,540.00 |
| Vehicle Expense-Lincoln | 7,170.00 | 7,170.00 |
| RBBSC Trans.-Lincoln | | |
| Staff Food & Training-Lincoln | 350.00 | 350.00 |
| Club Gear-Lincoln | 300.00 | 300.00 |
| Awards/Recognition-Lincoln | 400.00 | 400.00 |
| Supplies Copier Printing Mail | 1,238.00 | 1,238.00 |
| Office Equipment & Hardware-Lin | | |
| Software, Licenses & Fees-Linco | 1,297.00 | 1,297.00 |
| Utilities-Lincoln | 18,852.00 | 18,852.00 |
| Rent-Lincoln | 25,200.00 | 25,200.00 |
| Total Lincoln Expenses | 64,947.00 | 64,947.00 |
| Total Club and Camp Expenses | 268,600.00 | 268,600.00 |
| Lincoln Street Relocation Exp. | | |

Boys & Girls Club of Bloomington Profit & Loss Budget Performance January through December 2018

| | YTD Budget | Annual Budget |
|---------------------------------|------------|---------------|
| Kenworthy Admin Center | | |
| Audit and Tax Return | 9,000.00 | 9,000.00 |
| Professional & Legal | 1,000.00 | 1,000.00 |
| Property Taxes | 2,800.00 | 2,800.00 |
| Youth of the Year | 550.00 | 550.00 |
| Facility Maint., Admin | 1,500.00 | 1,500.00 |
| Vehicle Expense | 500.00 | 500.00 |
| Supplies Copier Printing Mail | | |
| Staff Food & Training-Admin | 2,200.00 | 2,200.00 |
| Supplies Copier Printing, Mail | 8,768.00 | 8,768.00 |
| Office Equipment & Hardware-Adm | 3,100.00 | 3,100.00 |
| Software, License, Fees-Admin | 2,188.00 | 2,188.00 |
| Advertising-Admin | 500.00 | 500.00 |
| Board of Directors Expense | 11,000.00 | 11,000.00 |
| Payment Processing Fees | 16,000.00 | 16,000.00 |
| Payment Late Fees & Interest,Es | 100.00 | 100.00 |
| Background Checks | 2,400.00 | 2,400.00 |
| Utilities-Admin | 11,500.00 | 11,500.00 |
| Insurance | | |
| Director + Officers | 1,757.00 | 1,757.00 |
| Business Auto | | |
| Commercial Umbrella | | |
| Workers' Comp | 5,564.00 | 5,564.00 |
| Commercial Package | 26,003.00 | 26,003.00 |
| Total Insurance | 33,324.00 | 33,324.00 |
| Dues | | |
| State | 3,350.00 | 3,350.00 |
| Local | 1,300.00 | 1,300.00 |
| National | 6,700.00 | 6,700.00 |
| Total Dues | 11,350.00 | 11,350.00 |
| Professional Dev. & Cult.-Admin | | |
| Total Kenworthy Admin Center | 117,780.00 | 117,780.00 |
| Program Fees | | |
| Utilities old account | | |
| Fire & Security | | |
| Electricity | | |
| Gas | | |
| Water/Sewer | | |
| Total Utilities old account | | |

Boys & Girls Club of Bloomington
Profit & Loss Budget Performance
 January through December 2018

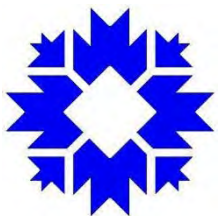
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 03/18/19
 Cash Basis

| | YTD Budget | Annual Budget |
|---------------------------------|--------------|---------------|
| Payroll Taxes | | |
| Social Security | 74,893.00 | 74,893.00 |
| Medicare | 17,515.00 | 17,515.00 |
| Payroll Taxes - Other | | |
| Total Payroll Taxes | 92,408.00 | 92,408.00 |
| Staffing Expenses | | |
| 401K Admin Expenses | 3,600.00 | 3,600.00 |
| ADP Payroll Fees | 8,600.00 | 8,600.00 |
| Staffing IU Work Study | 4,250.00 | 4,250.00 |
| Staffing AmeriCorps & VISTA | 22,612.00 | 22,612.00 |
| Unemployment Compensation | | |
| Payroll | | |
| Camp Rock | 80,348.00 | 80,348.00 |
| Administrative Staff | 326,120.00 | 326,120.00 |
| Camp | 0.00 | 0.00 |
| Lincoln Street Unit | 205,211.00 | 205,211.00 |
| Ellettsville Unit | 322,731.00 | 322,731.00 |
| Crestmont Unit | 270,550.00 | 270,550.00 |
| Support Staff | | |
| Professional Staff | 20,000.00 | 20,000.00 |
| Payroll - Other | | |
| Total Payroll | 1,224,960.00 | 1,224,960.00 |
| Benefits | | |
| Healthy Lifestyle Reimbursement | 3,600.00 | 3,600.00 |
| Health & Life Insurance | 49,500.00 | 49,500.00 |
| Retirement | 12,000.00 | 12,000.00 |
| Total Benefits | 65,100.00 | 65,100.00 |
| Total Staffing Expenses | 1,329,122.00 | 1,329,122.00 |
| Total Expense | 1,884,660.00 | 1,884,660.00 |
| Net Ordinary Income | 5,340.00 | 5,340.00 |
| Other Income/Expense | | |
| Other Income | | |
| Capital Campaign | | |
| Big Futures | | |
| Capital Campaign Interest | | |
| Total Capital Campaign | | |

Boys & Girls Club of Bloomington
Profit & Loss Budget Performance
 January through December 2018

12:56 PM
 03/18/19
 Cash Basis

| | YTD Budget | Annual Budget |
|--|------------|---------------|
| Temporarily Restricted Income | | |
| Crestmont Fund St. John | | |
| Scholarships Camp Rock | | |
| LOKPAP Income | | |
| Camping Expedition Funds | | |
| Interest Income Restricted | | |
| Total Temporarily Restricted Income | | |
| Lincoln Remodel Fund | | |
| Total Other Income | | |
| Other Expense | | |
| Lincoln Remodel Utilities | | |
| Capital Campaign Expenses | | |
| CC Miscellaneous Expense | | |
| Interest ONB Loan | | |
| Total Capital Campaign Expenses | | |
| Temporarily Restricted Expenses | | |
| Scholarships Camp Rock | | |
| Teens | | |
| Various Temporary Expenses | | |
| Total Temporarily Restricted Expenses | | |
| Total Other Expense | | |
| Net Other Income | 5,340.00 | |
| Net Income | 5,340.00 | 5,340.00 |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Catholic Charities Bloomington

Address: 803 N Monroe Street, Bloomington, IN

Phone: 812.332.1262

E-Mail: occase@ccbin.org

Website: <http://www.archindy.org/cc/bloomington/>

President of Board of Directors: Robin Gress

Name of Executive Director:

Phone: David Bethuram

E-Mail: Dbethuram@archindy.org

Name and Title of Person to Present Proposal to the Committee: O'Connell Case, LCSW, Clinical Director

Phone: 812.332.1262

E-Mail: occase@ccbin.org

Name of Grant Writer: O'Connell Case

Phone: 812.332.1262

E-Mail: occase@ccbin.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 8 | 2 | 18 |

AGENCY 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.

Catholic Charities Bloomington (CCB) Vulnerable Children Expansion Grant seeks to increase therapeutic services for children, particularly under the age of 8. This will be accomplished via the following:

1. Increase access and capacity of trauma-informed care for children and their families.
2. Provide high-quality trauma-informed services for those most vulnerable.
3. Increase capacity to intervene early with children who have experienced trauma and attachment wounds.

PROJECT INFORMATION

Project Name: Vulnerable Children Expansion Grant

Total cost of project: \$20,670

Requested amount of JHSSF funding: \$14,705

Total number of City residents anticipated to be served by this project in 2019: 198

Total number of clients anticipated to be served by this project in 2019: 250 children by staff.

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Catholic Charities Bloomington (CCB) is seeking a one-time investment of \$14,705 to expand agency capacity to treat children under the age of 8 with trauma and attachment wounds. Since our agency has developed a reputation for trauma treatment for the age span, we have seen an increase demand for services for children under the age of 8. Children present with disrupted attachment, emotional regulation issues, and behaviors that jeopardize their day care, preschool and after school placements. Schools are requesting assistance with treatment as it is jeopardizing the learning of not only the child, but other students around them. The Department of Social Services is referring families at risk to our agency. Over the past year, we have treated 179 children under the age of 8 in 1777 treatment sessions. We need to add another therapist with working knowledge of trauma treatment for children to provide early intervention and change the trajectory of their lives and of their families. Our demand for therapeutic skills for young children has increased almost 50%. The most difficult part of adding a new therapist is being able to support their first 6 months, as they are establishing client relationships, being added to insurance, and being trained for this special population. We are requesting a bridge grant to assist in adding a new specialized therapist to increase our capacity for early intervention and treatment of children and their families.

Address where project will be housed: 803 N. Monroe Street, 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 to capital improvements to real estate and if you do not own the property at which the project 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.*

Not seeking funds for capital improvements.

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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

N/A

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

EMDR Consulting: \$1,000 scholarship to train a new therapist

Archdiocese of Indianapolis: \$800 for a laptop.

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

September 13 – Submit claim for salary cost of July and August @ \$2,941 per month = \$5882

November 8 – Submit claim for the salary cost of September and October @ \$2,941 = \$5,882

December 3 – Submit claim for the salary cost of November \$2,941

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 trained 8 graduate students (volunteers) along with our current staff in Theraplay and Play Therapy through last year’s grants. We would like to hire one of those students graduating who has shown good efficacy in working with young children. EMDR training this summer will be obtained through a \$1,000 scholarship our agency earns for sponsoring the training locally. Archdiocese’s Department of Information Systems will supply a laptop. Our current budget can cover the 5 months of benefits at \$833 per month. If awarded the requested \$14,705, our CCB budget will be able to absorb the remaining costs ongoing.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, **will you be able to proceed with partial funding?**
 Yes No

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

| | Item | Cost |
|------------------------|---|-----------------|
| Priority #1 | First five months of therapist salary @2,941/month | \$14,705 |
| Priority #2 | | |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$14,705 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The Community Survey in Bloomington's Housing and Neighborhood Development's 2015-2019 Consolidation Plan (p.54) ranked mental health and related services as the most critical need for our community. According to SCAN 2012 a significant number of households, particularly in the lower incomes, report that stress, anxiety and depression negatively impact their lives (p. 105). Additionally, the Client Challenges Survey in this report showed that a significant number of households cannot pay for counseling.

Violence and substance abuse have been strongly linked to trauma and lack of attachment. Studies show that two-thirds of those with substance use issues have experienced abuse, neglect, and/or related traumatic events. Without treatment for root causes, the cycle often continues when these victims become parents.

Since 2012 there has been an increase in Medicaid recipients; however, CCB has found limited mental health providers. In addition, there has been a significant increase in large deductibles in commercial insurance, making mental health services unaffordable to those families. CCB is the only agency in Bloomington providing therapeutic services to children under the age of 5 covered by Medicaid.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

CCB has become known for treating trauma, especially children affected by the opioid addiction. The demand for services for children under 8 years has exploded and families are waiting an average of 6 to 8 weeks for treatment. To increase capacity, operational funding is requested to bridge the cost to hire another full-time therapist who can treat this age group. With the help of last year's grant, we were able to expand staff from 5.5 to 7. To increase capacity again, operational funding is requested to hire a therapist to treat an additional 25 children a week, which cost will be able to be absorbed into the budget by November.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

1. Early intervention with young children prevents long-term emotional, social, and educational challenges by providing them with coping skills to be successful in those settings.
2. Interrupt the cycle of trauma in a family by treating both parents and children when needed.
3. Early intervention provides reinforcement of secure attachment with caregivers, giving children the foundation to create and maintain healthy relationships throughout their lifespan. Leading them to be successful contributing members in the community.
4. Increasing emotional regulation will increase school readiness and better academic success.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

- A. There will be an increase in available appointments specializing in treatment for children under 8. We anticipate increasing 25 more sessions per week.
- B. Through monthly surveys the following outcomes will be measured:
 - (1) Caregivers will report that they feel more capable of parenting effectively.
 - (2) Families will report fewer emotional and behavioral problems at home and school.
 - (3) Children would be able to remain in school or child care longer, allowing families to maintain employment.

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.

The Center for Disease Control (CDC) reports that 1 in 6 U.S. children aged 2-8 years (17.4%) had been diagnosed with mental, behavioral, or developmental disorder. A decade ago, the general belief was that young children were not affected by what they experienced or witnessed. What we know now is that this is a sensitive period in brain development as children are more receptive to receiving new information and internalizing experiences. High scores on the screening tool, Adverse Childhood Experiences (ACE), report that these early experiences, which occur at surprisingly high rates across all socioeconomic groups, have a clear impact on long-term development and health outcomes. With this growing evidence of the prevalence and importance of early intervention with children, there has been more identification by pediatricians and referrals to our agency. There are few providers that see children under the age of 8 that will accept Medicaid and no local providers that treat children under 5. Young children heal quickly and the sooner we are able to intervene and treat, the quicker the child and therefore the family will heal. Treatment for the 8 and under require many different types of interventions and treatment modalities, depending on the family. With the help of previous Jack Hopkin's Grants, we have built a staff with competency in a variety of different interventions. In addition, we are adding an ongoing Positive Parenting Group facilitated by staff, designed to address families experiencing poverty. Parenting related challenges during infancy and early childhood can impact the development of important neural pathways and the architecture of the brain. Mounting research shows this disruption can increase the likelihood of future mental health problems. With the increase in capacity to work with families with children under 8 we hope to avoid future issues and heal families.

Treatment Interventions used with families and children under 8:

Theraplay: A type of family therapy that increases self-esteem, trust in others, and increased engagement of families. It is particularly recommended for children with reactive attachment disorder and their families done in an interactive engaging way. Without the attachment piece strengthened it is difficult for children and families to recover.

Play Therapy: Play Therapy is a developmentally appropriate therapeutic service provided by a trained mental health professional. Children have not yet the language or mental skills to talk about what impacts them, so play is their language. Therapy is therefore conducted through play itself as the therapist helps a child to address and resolve their concerns. Therapists will learn the in-depth specialty of assisting children in healing their trauma.

EMDR: One of the most cutting-edge techniques in trauma treatment is Eye Movement Desensitization and Reprocessing (EMDR) therapy. Studies have consistently found that EMDR effectively decreases or eliminates the symptoms of post-traumatic stress for the majority of clients. In addition, case studies are showing that children with Reactive Attachment Disorder are greatly benefiting from EMDR, with the children reporting that they felt better about family, school, and truthfulness.

Jack Hopkins Social Services Funding Application 2019
Catholic Charities Bloomington- Vulnerable Children Expansion Grant

I. Full Time Therapist

| | |
|--|-----------------|
| Projected Salary | \$18,870 |
| (173 hours per month x 5month x \$17 per hour) | |
| (Benefits of \$833 per month x 5 months) | |
| Subtotal: | \$18,870 |

II. Additional Costs

| | |
|------------------|----------------|
| EMDR Training | \$1,000 |
| Laptop | \$800 |
| Subtotal: | \$1,800 |

III. Leveraged Funds:

| | |
|-----------------------------|----------------|
| EMDR Consulting scholarship | \$1,000 |
| Laptop from Archdioceses | \$800 |
| Benefits paid by CCB | \$4,165 |
| Subtotal: | \$5,965 |

| | |
|-------------------------|-----------------|
| Total Project: | \$20,670 |
| TOTAL REQUESTED: | \$14,705 |

Catholic Charities Bloomington
Counseling - CCB

Archdiocese of Indianapolis
Profit and Loss
FYTD as of December 31, 2018
 Counseling - CCB Year To Date December 31, 2018

| | Actual | Budget | Fav (Unfav) |
|--|-------------------|-------------------|--------------------|
| Revenue | | | |
| Contribution Revenue | 65,095 | 86,301 | (21,206) |
| Program Fee Revenue | 147,207 | 175,500 | (28,293) |
| Grant Revenue and Other Public Support Revenue | 54,877 | 27,592 | 27,285 |
| Other Revenue | 0 | 750 | (750) |
| Total Revenue | \$ 267,179 | \$ 290,143 | \$ (22,964) |
| Expenses | | | |
| Salaries And Wages Expense | 156,437 | 158,271 | 1,835 |
| Payroll Taxes And Benefits Expense | 44,693 | 40,274 | (4,420) |
| Professional Services Expense | 37,680 | 36,649 | (1,031) |
| Admin And Supplies Expense | 6,531 | 6,800 | 268 |
| Repairs And Maintenance Expense | 1,590 | 4,000 | 2,411 |
| Occupancy Costs | 26,426 | 22,745 | (3,682) |
| Bad Debt Expense | (17,000) | 0 | 17,000 |
| Other Expenses | 8,220 | 8,270 | 51 |
| Total Expenses | \$ 264,577 | \$ 277,009 | \$ 12,432 |
| Change in Net Assets | \$ 2,602 | \$ 13,134 | \$ (10,532) |



CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION

AGENCY CONTACT INFORMATION

Lead Agency Name: Center for Sustainable Living dba Indiana Solar For All

Address: PO Box 1665, Bloomington, IN 47402

Phone:

E-Mail:

Website: simplycsl.org

President of Board of Directors: Andrea Avena Koenigsberger

Name of Executive Director: Stephanie Kimball, Indiana Solar for All

Phone: 812-361-3889

E-Mail: Kimball.Stephanie@gmail.com

Name and Title of Person to Present Proposal to the Committee:

Phone: Anne Hedin, Treasurer

E-Mail: a.hedin@comcast.net

Name of Grant Writer: Brent Hutchison with help from Anne Hedin

Phone: 801-837-3403 (Brent)

E-Mail: brenthutch@gmail.com

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [X] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~20 |

AGENCY 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 (ISFA) is a non-profit program whose mission is to quickly ramp up the spread of rooftop solar to all households in Indiana while making it affordable to those who need it most – the people most vulnerable to electric rate increases.

ISFA 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.

After lengthy preparation, ISFA launched its pilot program in 2018.

PROJECT INFORMATION

Project Name: Indiana Solar for All

Total cost of project: \$92,162.88

Requested amount of JHSSF funding: \$31,290

Total number of City residents anticipated to be served by this project in 2019: 30 (and one recipient runs a daycare in her home for about 6 children who will indirectly benefit)

Total number of clients anticipated to be served by this project in 2019: 31

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Indiana Solar for All (ISFA) seeks a one-time investment of \$31,290 from JHSSF to purchase safety gear, specialized installation tools and a utility truck to carry everything needed to install a 3 kilowatt system.

The annual Solarize campaign sponsored by the City of Bloomington and SIREN is the major funding source for ISFA. Solarize installers collect a small per-watt surcharge on every contract and donate it to ISFA, which uses the money to purchase solar system components, installation supplies and consulting services. The amount collected one year pays for grants the next year. 2017 donations are paying for eight full grants in Round 1 (2018-19). 2018 donations will pay all costs for nine grants in Round 2 (2019-2020) while three households will be enabled to purchase a system at reduced cost.

In order to give the greatest number of solar grants, we minimize expenses by using volunteer labor from the community to supplement the work commitment of grantees. In addition, installation team members arrive at the job site bringing their own hand tools. So far we have also been controlling costs by borrowing the items we hope to buy with the aid of JHSSF funding.

Every installation requires 10 panels, various system components, 10' lengths of conduit and 14' lengths of racking, ladders, tables, tools and other gear. It would save a lot of time and trouble to be able to store and transport all this gear in a single vehicle which is under ISFA control. Additionally, we hope to replace borrowed safety harnesses, climbing ropes, hard hats and safety glasses. The program also needs to acquire a set of the tools that professional installers use.

Address where project will be housed:

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 to capital improvements to real estate and if you do not own the property at which the project 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.*

ISFA does not own, rent or lease the homes on which the solar systems are installed. Each ISFA grant recipient owns the family home and owns the solar system. Our long-term interest is in helping more people go solar and making it affordable for low- to moderate-income households.

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.

Each household applies for the required Building Permits from the Monroe County Building Dept. for their solar system. The consulting installer files for an interconnect agreement with Duke Energy. Permitting takes a day, the agreement takes a couple of weeks. Both are routine.

Note: Funds will not be disbursed until all requisite variances or approvals are obtained.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

In the first year of the program, Solarize 2017 generated donations of \$46,144.88 (\$32,272.30 in cash, \$13,872.58 in kind). ISFA made its first grants to eight households. Four were completed in 2018; two more have been completed this March; and the final two will be completed in April. The first four cost \$22,570.32. We have enough remaining of the 2017 Solarize donations (\$23,574.3) to cover materials and consulting fees for the final four installations in Round 1.

In addition, 2018 Solarize and other donations in the bank are sufficient to cover the costs of the 12 grants in Round 2, projecting from the costs of Round 1. Orders have not been placed for these installations yet. They will start in June and run through to April next year.

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

We anticipate submitting reimbursement claims in a single batch within a month of receiving funding and making the purchases.

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

ISFA partners with the City. The annual Solarize campaign has supplied recurring funding for materials and services. Installation work is done by ISFA recipients and community volunteers, keeping the average cost per system to ~\$1.60 per watt vs. ~\$2.90/w for comparable purchased system.

As a CSL project, ISFA receives valuable resources such as banking, website hosting, IT and administrative support. SIREN, also a CSL project, provides engineering expertise as well as organizational and hands-on support. Ten community volunteers (some experienced in construction and project management) donated their time and skills to the 2018 installations. Two solar churches donated \$2,800.

contributions, or volunteers.

FUNDING PRIORITIES -- RANKED

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

Yes No

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

| | Item | Cost |
|------------------------|--|-----------------|
| Priority #1 | Safety equipment (10 hard hats, rooftop rope and anchor system with 5 each of: body harnesses, reusable rooftop anchor brackets, 30-ft self-retracting lifelines, 6 ft shock absorbing lanyards, and locking carabiners to satisfy OSHA safety requirements) | \$3,270 |
| Priority #2 | Used 14-ft Freightliner MT45 Utility Step Van or similar | \$25,000 |
| Priority #3 | Specialized tools (including 2 portable impact drills, 2 portable drills, 2 torque wrenches, portable band saw, flat pry bars, conduit bender, professional electrical tools) | \$2,105 |
| Priority #4 | Fiberglass Ladders (6 ft step ladder, 20 ft extension ladder) | \$290 |
| Priority #5 | 15 ft Non-Rolling Scaffolding tower | \$625 |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$31,290 |

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 [2015-2019 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.” ISFA directly alleviates 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.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

ISFA seeks a one-time investment from the JHSSF to purchase a covered van for transport and storage, specialized tools, and safety equipment for volunteers at every installation. The success of past installations has depended entirely upon volunteers' access to and willingness to provide the proper tools. With the turnover in installation crews every season, we can't always count on this. Furthermore, the lack of specialized tools causes unnecessary delays. Not having enough safety gear increases risks to volunteers and poses potential liabilities to our organization. JHSSF funding would improve our ability to provide consistent, reliable service.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

ISFA directly benefits low- to moderate-income households by reducing their utility bills and increasing the value of their homes, thus improving their economic stability. It also provides training in skills that may help prepare people (especially the teenagers in ISFA families) for good-paying jobs. The renewable energy sector is creating jobs at a rate many times faster than the general economy.

ISFA's mission will become increasingly important as our community prepares for climate change. ISFA grantees report feeling empowered and grateful to be able to make a contribution by reducing their carbon footprint and adding clean energy sources to the grid. Even more than the average Solarize customer, they become advocates for solar because they invested themselves in it body and soul. Being part of a crew that can install a solar system in a day or two demystifies the transition to renewables. This attitude change is needed to mobilize a wide-spread response to the major challenge of our times.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

ISFA collects data on monthly energy production from each solar array, alongside recipients' monthly utility bill, to estimate the amount of defrayed costs per household. These data provide an easy, quantifiable way to assess the impact of the program over time.

We have already seen measurable impacts since the four installations in October/November 2018. In the following three months (the least productive of the year), utility costs were reduced approximately 16%, on average, per household. We also noticed a reduction in overall energy consumption per household compared to the previous year, suggesting a change in behavior among the families served.

OTHER COMMENTS (500 words or less)

Use this space to provide other information you think the Committee would find useful. Any additional

Dear Jack Hopkins Social Services Committee,

Please find attached our application for JHSS funding, together with our ISFA program budget and the 2017 year-end financial statement for the Center for Sustainable Living. We would like to clarify that we have not yet prepared our 2018 year-end financial statement, which is why we are submitting a financial statement for 2017. Moreover, the IRS granted us an extension to submit our 2017 tax return, as our accountant was unexpectedly pulled away from work due to a family health problem. Therefore, we do not have a 2017 audited financial statement, so we are submitting as email attachments, in addition to our 2017 year-end financial statement, our State and Federal audited financial statement from 2016.

ISFA Program Budget

<https://docs.google.com/spreadsheets/d/1StEVOhcBHDDUBz8OpRu7GjA7nAi5bBfsfjvHIQbuIFM/edit#gid=202586784>

comments should supplement, not restate, information provided in the foregoing.

| Indiana Solar for All Program Budget (a Project of the Center for Sustainable Living) | | | |
|---|----------|---------------|--------------------|
| JHSSF funding request 2019 | | Cost Per Item | Total Cost |
| 1. Supply truck/trailer to hold equipment | | \$25,000.00 | \$25,000.00 |
| Total: | | | \$25,000.00 |
| 2. Safety gear and Installation tools | Quantity | Cost Per Item | Total Cost |
| rooftop rope and anchor system | 5 sets | \$614.00 | \$3,070.00 |
| hard hats | 10 | \$20.00 | \$200.00 |
| tools, various | | | \$2,105.00 |
| 6' fiberglass stepladder | 1 | \$50.00 | \$50.00 |
| fiberglass 20' extension ladder | 1 | \$240.00 | \$240.00 |
| 15' non-rolling scaffolding tower | 1 | \$625.00 | \$625.00 |
| Total: | | \$1,549.00 | \$6,290.00 |
| Overall total cost | | | \$31,290.00 |

Table 1. ISFA Income 2017 - 2018

| Income source | Amount | Date Donated | Dedicated to: |
|---------------------------------------|--------------------|---------------------|---------------------|
| 2017 Solarize vendor in kind donation | \$13,872.58 | Q4 2017 (used 2018) | Round 1 (8 grants) |
| 2017 Solarize vendor donations | \$32,272.30 | Q1 2018 | " |
| 2018 Solarize vendor donations | \$32,159.50 | Q3 2018 | Round 2 (12 grants) |
| 2018 Solarize vendor donations | \$13,858.50 | Q4 2018 | " |
| Donations from individuals & churches | \$3,097.50 | Q3, Q4 2018 | |
| Transfer from SIREN | \$101.50 | | |
| Totals through 2018 | \$95,361.88 | | |

Table 2. ISFA Expenses 2018

| Items | Funding Source | Expenditures |
|--|----------------|--------------------|
| Systems components, 4 systems, Round 1 | 2017 Solarize | \$16,000.00 |
| consulting fees, Whole Sun Designs | 2017 Solarize | \$4,875.00 |
| Tools and supplies | 2017 Solarize | \$1,234.90 |
| Ethernet cabling kit | 2017 Solarize | \$14.97 |
| Volunteer accident insurance policy | 2017 Solarize | \$300.00 |
| Printing | 2017 Solarize | \$145.45 |
| Totals through 2018 | -- | \$22,570.32 |

Funds half the Round 1

Table 3: Value of hours worked by volunteers NOT receiving solar systems

| Tasks | Hours | \$ Value |
|-------|-------|----------|
|-------|-------|----------|

| | | |
|--|-----|------------|
| Install solar systems (4 installations, 2018) | 438 | \$9,198.00 |
| Fundraising and media outreach | 38 | \$798.00 |
| Conceptualization, documentation, administration | 120 | \$2,520.00 |
| Organizational development by SIREN | 269 | \$5,649.00 |

| | | |
|---|------------|--------------------|
| Total volunteer hours for non-recipients | 865 | \$18,165.00 |
|---|------------|--------------------|

* Note that volunteer hours are valued at the Indiana volunteer rate of \$21

Table 4: Value of hours worked in 2018 by ISFA grantees receiving solar systems

| Tasks | Hours | \$ Value |
|---|--------------|--------------------|
| Install solar systems (4 installations, 2018) | 468 | \$9,828.00 |
| Volunteer coordination, logistics | 72 | \$1,512.00 |
| Fundraising and media outreach | 100 | \$2,100.00 |
| Total volunteer hours for recipients | 640 | \$13,440.00 |

|

|

L installations; funds none of the Round 2 installations.

NOTES:
 1) The first Column & first two Rows of this sheet are locked to allow the headings and descriptions to always be displayed.
 2) This is a "STATIC" copy of the original dynamic Google Sheet "2017 Taxes Summary All CSL Projects" the data for it has been pulled via formula from its enclosed Tabs corresponding to each Project's Annual Report.
 3) Any additional, supporting/Reference Data or Tabs for a given Annual Report are combined into a separate spreadsheet file "2017 Ref. Data -CSL Projects", available here: https://docs.google.com/spreadsheets/d/1AaZPvUwW8AaVtGZbaHst_daw6QJuf_KoWdAaGdCtCkx2t4/edit#

| | 1 | 2 | 3 | 4 | 5 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 13 | 14 | All Projects (sub-total) w/o CSL-HQ | 16 CSL-HQ | All CSL, as a whole, including CSL-HQ | Cash in Bank from 2016 Tax Summary sheet | |
|--|--|-------------|---|----------|----------------|--|------------|-------------|------------------|--|-------------|------------|-------------------|---|---------------|-------------------------------------|--|---------------------------------------|---|---|
| | BCSP | BloomingVeg | BWFM | BYBB | Carbon Xchange | Discards | FoLM | GCMTS | Habitat Stewards | HFAF | OpenStreets | Overlook | Share@Bloomington | SIREN | SIREN dba SFA | Trillium | NA | PayPal company | 5 107,087.12 | |
| | None Found | None | Included | Included | None | via CSL-HQ | via CSL-HQ | None Found | None | Included | None Found | Included | None Found | Included | None | None Found | via CSL-HQ | PayPal company | 5 107,087.12 | |
| Beginning Balance: | \$21,810.59 | \$0.00 | \$21,781.40 | \$0.00 | \$1,460.00 | \$5,192.18 | \$0.00 | \$7,117.09 | \$1,334.81 | \$7,497.88 | \$7,447.90 | \$0.00 | \$809.36 | \$16,364.32 | \$0.00 | \$1,696.45 | \$92,801.98 | + \$14,886.14 | = \$107,087.12 | Agrees w/ 2016 taxes! |
| Reported TOTAL EXTERNAL INCOME figures: | \$15,694.25 | | \$28,026.52 | \$85.97 | | \$2,245.00 | \$921.00 | \$3,390.00 | | \$29,963.00 | \$388.71 | \$1,735.23 | \$0.00 | \$1,074.10 | \$101.15 | \$10.00 | \$83,634.93 | + \$2,843.62 | = \$86,478.55 | |
| Reported TOTAL INTERNALLY Transferred) INCOME figures: | \$500.00 | | | \$0.00 | | \$1,349.15 | \$115.39 | \$2,750.00 | | | | | | | | | \$4,714.54 | + \$23,569.33 | = \$28,283.87 | |
| Reported TOTAL INCOME figures: | \$16,194.25 | | \$28,026.52 | \$85.97 | | \$3,594.15 | \$1,036.39 | \$6,140.00 | | \$29,963.00 | \$388.71 | \$1,735.23 | \$0.00 | \$1,074.10 | \$101.15 | \$10.00 | \$88,349.47 | + \$26,432.95 | = \$114,782.42 | |
| Reported TOTAL EXTERNAL EXPENSES figures: | \$16,289.08 | | | \$85.97 | | | | | | | | | | | | | \$16,375.05 | + \$7,733.11 | = \$24,108.16 | |
| Reported TOTAL INTERNAL EXPENSES figures: | \$736.63 | | \$1,277.81 | \$0.00 | | | | | | | | | | | | | \$2,014.44 | + \$17,084.51 | = \$19,098.95 | |
| Reported TOTAL EXPENSES figures: | \$17,025.71 | | \$19,186.76 | \$85.97 | | \$2,701.71 | \$173.02 | \$13,250.00 | | \$23,390.29 | \$1,618.67 | \$1,398.20 | \$780.00 | \$668.32 | \$0.00 | \$0.00 | \$80,266.65 | + \$24,817.62 | = \$105,084.27 | |
| Reported NET PROFIT/(LOSS) | -\$831.46 | \$0.00 | \$8,839.76 | \$0.00 | | \$892.44 | \$863.37 | -\$7,110.00 | \$0.00 | \$6,572.71 | -\$1,229.96 | \$337.03 | -\$780.00 | \$415.78 | \$101.15 | \$10.00 | \$8,082.82 | + -\$4,868.49 | = \$3,214.33 | NOTE: This Reported NET PROFIT/(LOSS) value uses the Net, Incremental, Reportable I & E attributable to CSL-HQ. |
| (Verification Calculations): | -\$831.46 | \$0.00 | \$8,839.76 | \$0.00 | \$0.00 | \$892.44 | \$863.37 | -\$7,110.00 | \$0.00 | \$6,572.71 | -\$1,229.96 | \$337.03 | -\$780.00 | \$415.78 | \$101.15 | \$10.00 | \$8,082.82 | + \$1,613.33 | = \$9,696.15 | NOTE: This Reported NET PROFIT/(LOSS) value uses the Reported Total I & E for the CSL-HQ account. |
| (Verification Calculations): | | | | | | | | | | | | | | | | | | | | \$3,214.33 |
| Ending Balance: | \$20,979.13 | \$0.00 | \$30,621.16 | \$0.00 | \$1,460.00 | \$6,084.62 | \$863.37 | \$7.00 | \$1,334.81 | \$14,070.59 | \$6,217.94 | \$337.03 | \$29.36 | \$16,145.60 | \$101.15 | \$1,706.45 | \$99,948.30 | + \$16,151.87 | = \$116,100.17 | Matches all bank statement balances! |
| (Verification Calculations): | \$20,979.13 | \$0.00 | \$30,621.16 | \$0.00 | \$1,460.00 | \$6,084.62 | \$863.37 | \$7.00 | \$1,334.81 | \$14,070.59 | \$6,217.94 | \$337.03 | \$29.36 | \$16,145.60 | \$101.15 | \$1,706.45 | \$99,948.30 | + \$16,151.87 | = \$116,100.17 | |
| Comment(s): | This project had no financial activity in 2017, so the opening and closing balances have been directly entered, as no Annual Report was submitted. | | This project was forming in 2017, so there was almost no financial activity, except one donation that was spent to buy sewing materials and tools for making the shopping bags. | | | This project had no financial activity in 2017, so the opening and closing balances have been directly entered, as no Annual Report was submitted. | | | | This project had no financial activity in 2017, so the opening and closing balances have been directly entered, as no Annual Report was submitted. | | | | NOTE: This calculation was edited to account for donations to SIREN via PayPal that remained on-hand in a separate PayPal account at the end of 2017, so SIREN's bank account until SFA could become its own project in 2018. Since the SFA gift was received & acknowledged in 2017, SIREN is reporting it here... | | | Checked a balanced CSL-HQ report based on bank statements and Quicken reports. Correct ✓ | | NOTE: There are TWO Reported NET PROFIT/(LOSS) values shown for CSL-HQ, that are calculated based on different sums: - One set uses the CSL-HQ "Reported TOTAL Income and Expenses" including pass-through transfers of Project funds, per the grand-our figures. - The second set uses the "Net, Incremental, Reportable Income and Expenses" attributable to actual CSL-HQ activity, as shown by the bold blue figures. | |

NP-20

State Form 51062
(R7 / B-13)

Indiana Department of Revenue
Indiana Nonprofit Organization's Annual Report
For the Calendar Year or Fiscal Year
Beginning 01 01 2016 and Ending 12 31 2016
MM/DD/YYYY MM/DD/YYYY

Check if: Change of Address
Amended Report
Final Report: Indicate
Date Closed

Due on the 15th day of the 5th month following the end of the tax year.
NO FEE REQUIRED.

Name of Organization

CENTER FOR SUSTAINABLE LIVING INC

Telephone Number

812 269 6109

Address

PO BOX 1665

County

MONROE

Indiana Taxpayer Identification Number

City

BLOOMINGTON

State

IN

Zip Code

47402

Federal Identification Number

31 1074237

Printed Name of Person to Contact

ANN WATZEL

Contact's Telephone Number

812 964 3571

If you are filing a federal return, attach a completed copy of Form 990, 990EZ, or 990PF.

Note: If your organization has unrelated business income of more than \$1,000 as defined under Section 513 of the Internal Revenue Code, you must also file Form IT-20NP.

Current Information

1. Have any changes not previously reported to the Department been made in your governing instruments, (e.g.) articles of incorporation, bylaws, or other instruments of similar importance? If yes, attach a detailed description of changes.
2. Indicate number of years your organization has been in continuous existence. **34**
3. Attach a schedule, listing the names, titles and addresses of your current officers. **SEE STATEMENT 1**
4. Briefly describe the purpose or mission of your organization below.

EDUCATION AND GENERAL IMPROVEMENT OF THE ENVIRONMENT.

Email Address: **AWATZEL@GMAIL.COM**

I declare under the penalties of perjury that I have examined this return, including all attachments, and to the best of my knowledge and belief, it is true, complete, and correct.

Signature of Officer or Trustee

ANN WATZEL

Name of Person(s) to Contact

TREASURER

Title

Date

812 269 6109

Daytime Telephone Number

Important: Please submit this completed form and/or extension to:
Indiana Department of Revenue, Tax Administration
P.O. Box 6481
Indianapolis, IN 46206-6481
Telephone: (317) 232-0129

Extensions of Time to File

The Department recognizes the Internal Revenue Service application for automatic extension of time to file, Form 8868. **Please forward a copy of your federal extension, identified with your Nonprofit Taxpayer Identification Number (TID), to the Indiana Department of Revenue, Tax Administration by the original due date to prevent cancellation of your sales tax exemption.** Always indicate your Indiana Taxpayer Identification number on your request for an extension of time to file.

Reports post marked within thirty (30) days after the federal extension due date, as requested on Federal Form 8868, will be considered as timely filed. A copy of the federal extension must also be attached to the Indiana report. In the event that a federal extension is not needed, a taxpayer may request in writing an Indiana extension of time to file from the: Indiana Department of Revenue, Tax Administration, P.O. Box 6481, Indianapolis, IN 46206-6481, (317) 232-0129.

If Form NP-20 or extension is not timely filed, the taxpayer will be notified by the Department pursuant to I.C. 6-2.5-5-21(d), to file Form NP-20. If within sixty (60) days after receiving such notice the taxpayer does not file Form NP-20, the taxpayer's exemption from sales tax will be canceled.



25413111022

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

2016

Department of the Treasury
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990 and its instructions is at www.irs.gov/form990.

Open to Public Inspection

A For the 2016 calendar year, or tax year beginning _____, **and ending** _____

B Check if applicable:

Address change

Name change

Initial return

Final return/terminated

Amended return

Application pending

C Name of organization: **CENTER FOR SUSTAINABLE LIVING INC**

Doing business as _____

Number and street (or P.O. box if mail is not delivered to street address) Room/suite
PO BOX 1665 _____

City or town, state or province, country, and ZIP or foreign postal code
BLOOMINGTON IN 47402

D Employer identification number: **31-1074237**

E Telephone number: **812-269-6109**

F Name and address of principal officer:
RYAN CONWAY
PO BOX 1665
BLOOMINGTON IN 47402

G Gross receipts \$: **190,264**

H(a) Is this a group return for subordinates? Yes No

H(b) Are all subordinates included? Yes No
If "No," attach a list. (see instructions)

I Tax-exempt status: 501(c)(3) 501(c) () (insert no.) 4947(a)(1) or 527

J Website: **HTTPS://WWW.SIMPLYCSL.ORG**

K Form of organization: Corporation Trust Association Other

L Year of formation: **1983**

M State of legal domicile: **IN**

Part I Summary

| | | | |
|--|---|---------------------------|--------------|
| Activities & Governance | 1 Briefly describe the organization's mission or most significant activities. EDUCATION AND GENERAL IMPROVEMENT OF THE ENVIRONMENT. | | |
| | 2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets. | | |
| | 3 | 3 | |
| | 4 | 3 | |
| | 5 | 0 | |
| | 6 | 0 | |
| | 7a | 0 | |
| 7b | 0 | | |
| Revenue | 8 Contributions and grants (Part VIII, line 1h) | Prior Year | Current Year |
| | 9 Program service revenue (Part VIII, line 2g) | | 136,233 |
| | 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) | | 54,031 |
| | 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | | 0 |
| | 12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) | | 190,264 |
| Expenses | 13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) | | 100,589 |
| | 14 Benefits paid to or for members (Part IX, column (A), line 4) | | 0 |
| | 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | | 0 |
| | 16a Professional fundraising fees (Part IX, column (A), line 11e) | | 0 |
| | b Total fundraising expenses (Part IX, column (D), line 25) ▶ | 0 | |
| 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) | | 69,004 | |
| 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | | 169,593 | |
| 19 Revenue less expenses. Subtract line 18 from line 12 | | 20,671 | |
| Net Assets or Fund Balances | 20 Total assets (Part X, line 16) | Beginning of Current Year | End of Year |
| | 21 Total liabilities (Part X, line 26) | 86,416 | 107,087 |
| | 22 Net assets or fund balances. Subtract line 21 from line 20 | 0 | 0 |
| | | 86,416 | 107,087 |

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.

Sign Here

Signature of officer: **ANN WATZEL** Date: _____

Type or print name and title: **TREASURER**

Paid Preparer Use Only

Print/Type preparer's name: **David Sare** Preparer's signature: **David Sare** Date: **11/15/17** Check if self-employed PTIN: **P01398345**

Firm's name: **Sare Associates, P.C.** Firm's EIN: **35-1845142**

Firm's address: **4327 E 3rd Bloomington, IN 47401-5551** Phone no.: **812-339-9330**

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:

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 \$ **107,818** including grants of \$ **100,589**) (Revenue \$)
EDUCATION AND GENERAL IMPROVEMENT OF THE ENVIRONMENT.

4b (Code:) (Expenses \$ **19,098** including grants of \$) (Revenue \$)
HEALTHFUL FOOD FOR ALL

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O.)
(Expenses \$ **42,677** including grants of \$) (Revenue \$)

4e Total program service expenses **169,593**

Part IV Checklist of Required Schedules

| | | Yes | No |
|-----|---|-----|----|
| 1 | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A | X | |
| 2 | Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? | X | |
| 3 | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I | | X |
| 4 | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II | | X |
| 5 | 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? If "Yes," complete Schedule C, Part III | | X |
| 6 | 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? If "Yes," complete Schedule D, Part I | | X |
| 7 | Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II | | X |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III | | X |
| 9 | 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? If "Yes," complete Schedule D, Part IV | | X |
| 10 | Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V | | X |
| 11 | 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. | | |
| a | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI | | X |
| 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? If "Yes," complete Schedule D, Part VII | | X |
| c | 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? If "Yes," complete Schedule D, Part VIII | | X |
| d | 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? If "Yes," complete Schedule D, Part IX | | X |
| e | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X | | X |
| f | 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)? If "Yes," complete Schedule D, Part X | | X |
| 12a | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII | | X |
| b | Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional | | X |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | | X |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States? | | X |
| 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? If "Yes," complete Schedule F, Parts I and IV | | X |
| 15 | 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? If "Yes," complete Schedule F, Parts II and IV | | X |
| 16 | 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? If "Yes," complete Schedule F, Parts III and IV | | X |
| 17 | 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? If "Yes," complete Schedule G, Part I (see instructions) | | X |
| 18 | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II | | X |
| 19 | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III | | X |

Part IV Checklist of Required Schedules (continued)

| | Yes | No |
|--|----------|----------|
| 20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> | | X |
| b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? | | |
| 21 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 | |
| 22 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 |
| 23 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 |
| 24a 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 "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> | | X |
| b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | | |
| c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? | | |
| d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? | | |
| 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. 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 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 |
| 26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i> | | X |
| 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> | | X |
| 28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): | | |
| a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> | | X |
| b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> | | X |
| c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> | | X |
| 29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> | | X |
| 30 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 |
| 31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> | | X |
| 32 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 |
| 33 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 |
| 34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, or IV, and Part V, line 1</i> | | X |
| 35a Did the organization have a controlled entity within the meaning of section 512(b)(13)? | | X |
| 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> | | |
| 36 Section 501(c)(3) organizations. 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 |
| 37 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 |
| 38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. 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

Table with columns for question numbers (1a-14b), Yes/No checkboxes, and numerical responses. Includes questions about Form 1096, Form W-2G, backup withholding, Form W-3, unrelated business gross income, foreign accounts, prohibited tax shelter transactions, annual gross receipts, and sponsoring organizations.

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 in 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 |
|----|---|-----|----|
| 1a | 3 | | |
| 1b | 3 | | |
| 2 | | | X |
| 3 | | | X |
| 4 | | | X |
| 5 | | | X |
| 6 | | | X |
| 7a | | | X |
| 7b | | | X |
| 8 | | | |
| 8a | | X | |
| 8b | | X | |
| 9 | | | X |

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

| | | Yes | No |
|-----|--|-----|----|
| 10a | | | X |
| 10b | | | |
| 11a | | | X |
| 12a | | | X |
| 12b | | | |
| 12c | | | |
| 13 | | | X |
| 14 | | | X |
| 15a | | | X |
| 15b | | | X |
| 16a | | | X |
| 16b | | | |

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed **None**
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 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 in Schedule O)
- 19 Describe in 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.
- 20 State the name, address, and telephone number of the person who possesses the organization's books and records: **▶**

ANN WATZEL **112 S MORNINGSIDE DR** **IN 47408** **812-269-6109**
BLOOMINGTON

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 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 and/or Box 7 of Form 1099-MISC) 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.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

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) | (E) Reportable compensation from related organizations (W-2/1099-MISC) | (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) RHONDA BAIRD | 0.00 | | | | | | | | | |
| PRESIDENT | 0.00 | | | X | | | 0 | 0 | 0 | |
| (2) RYAN CONWAY | 0.00 | | | | | | | | | |
| BOARD SECRETARY | 0.00 | | | X | | | 0 | 0 | 0 | |
| (3) ANN WATZEL | 0.00 | | | | | | | | | |
| TREASURER | 0.00 | | | X | | | 0 | 0 | 0 | |
| (4) | | | | | | | | | | |
| (5) | | | | | | | | | | |
| (6) | | | | | | | | | | |
| (7) | | | | | | | | | | |
| (8) | | | | | | | | | | |
| (9) | | | | | | | | | | |
| (10) | | | | | | | | | | |
| (11) | | | | | | | | | | |

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) | (E) Reportable compensation from related organizations (W-2/1099-MISC) | (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 | | | |
| | | | | | | | | | | |
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| | | | | | | | | | | |
| 1b Sub-total | | | | | | | | | | |
| c Total from continuation sheets to Part VII, Section A | | | | | | | | | | |
| d Total (add lines 1b and 1c) | | | | | | | | | | |

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 former officer, director, or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> | | 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> | | 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> | | 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 | |
|--|---|--|--|---|--|--------|
| Contributions, Gifts, Grants and Other Similar Amounts | 1a Federated campaigns | 1a | | | | |
| | b Membership dues | 1b | | | | |
| | c Fundraising events | 1c | | | | |
| | d Related organizations | 1d | | | | |
| | e Government grants (contributions) | 1e | 99,989 | | | |
| | f All other contributions, gifts, grants, and similar amounts not included above | 1f | 36,244 | | | |
| | g Noncash contributions included in lines 1a-1f | \$ | | | | |
| | h Total. Add lines 1a-1f | ▶ | 136,233 | | | |
| | Program Service Revenue | 2a WORKSHOPS/EVENTS | Busn. Code | 20,899 | | 20,899 |
| b WINTER FARMERS MARKET | | | 16,706 | | 16,706 | |
| c BIKE PROJECT | | | 16,426 | | 16,426 | |
| d | | | | | | |
| e | | | | | | |
| f All other program service revenue | | | | | | |
| g Total. Add lines 2a-2f | | ▶ | 54,031 | | | |
| Other Revenue | | 3 Investment income (including dividends, interest, and other similar amounts) | ▶ | | | |
| | 4 Income from investment of tax-exempt bond proceeds | ▶ | | | | |
| | 5 Royalties | ▶ | | | | |
| | 6a Gross rents | (i) Real | | | | |
| | | (ii) Personal | | | | |
| | b Less: rental exps. | | | | | |
| | c Rental inc. or (loss) | | | | | |
| | d Net rental income or (loss) | ▶ | | | | |
| | 7a Gross amount from sales of assets | (i) Securities | | | | |
| | | (ii) Other | | | | |
| | b Less: cost or other basis & sales exps. | | | | | |
| | c Gain or (loss) | | | | | |
| | d Net gain or (loss) | ▶ | | | | |
| | 8a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18 | a | | | | |
| | b Less: direct expenses | b | | | | |
| c Net income or (loss) from fundraising events | ▶ | | | | | |
| 9a Gross income from gaming activities. See Part IV, line 19 | a | | | | | |
| b Less: direct expenses | b | | | | | |
| c Net income or (loss) from gaming activities | ▶ | | | | | |
| 10a Gross sales of inventory, less returns and allowances | a | | | | | |
| b Less: cost of goods sold | b | | | | | |
| c Net income or (loss) from sales of inventory | ▶ | | | | | |
| Miscellaneous Revenue | | Busn. Code | | | | |
| 11a | | | | | | |
| b | | | | | | |
| c | | | | | | |
| d All other revenue | | | | | | |
| e Total. Add lines 11a-11d | ▶ | | | | | |
| 12 Total revenue. See instructions | ▶ | 190,264 | 0 | 0 | 54,031 | |

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

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII. | (A) Total expenses | (B) Program service expenses | (C) Management and general expenses | (D) Fundraising expenses |
|--|-----------------------|---------------------------------|--|-----------------------------|
| 1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 | 100,589 | 100,589 | | |
| 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 | | | | |
| 6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | | | | |
| 7 Other salaries and wages | | | | |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) | | | | |
| 9 Other employee benefits | | | | |
| 10 Payroll taxes | | | | |
| 11 Fees for services (non-employees): | | | | |
| 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.) | | | | |
| 12 Advertising and promotion | | | | |
| 13 Office expenses | 1,609 | 1,609 | | |
| 14 Information technology | 413 | 413 | | |
| 15 Royalties | | | | |
| 16 Occupancy | 3,000 | 3,000 | | |
| 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 | 521 | 521 | | |
| 24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.) | | | | |
| a COGS | 42,677 | 42,677 | | |
| b FOOD COSTS | 18,558 | 18,558 | | |
| c SUPPLIES | 1,348 | 1,348 | | |
| d MISCELLANEOUS | 733 | 733 | | |
| e All other expenses | 145 | 145 | | |
| 25 Total functional expenses. Add lines 1 through 24e | 169,593 | 169,593 | 0 | 0 |
| 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 | |
|------------------------------------|--|---|--------|--------------------|---------|
| Assets | 1 | Cash—non-interest bearing | 86,416 | 1 | 107,087 |
| | 2 | Savings and temporary cash investments | | 2 | |
| | 3 | Pledges and grants receivable, net | | 3 | |
| | 4 | Accounts receivable, net | | 4 | |
| | 5 | Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L | | 5 | |
| | 6 | Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L | | 6 | |
| | 7 | Notes and loans receivable, net | | 7 | |
| | 8 | Inventories for sale or use | | 8 | |
| | 9 | Prepaid expenses and deferred charges | | 9 | |
| | 10a | Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D | 10a | | |
| | b | Less: accumulated depreciation | 10b | 10c | |
| | 11 | Investments—publicly traded securities | | 11 | |
| | 12 | Investments—other securities. See Part IV, line 11 | | 12 | |
| | 13 | Investments—program-related. See Part IV, line 11 | | 13 | |
| | 14 | Intangible assets | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | | 15 | |
| 16 | Total assets. Add lines 1 through 15 (must equal line 34) | 86,416 | 16 | 107,087 | |
| Liabilities | 17 | Accounts payable and accrued expenses | | 17 | |
| | 18 | Grants payable | | 18 | |
| | 19 | Deferred revenue | | 19 | |
| | 20 | Tax-exempt bond liabilities | | 20 | |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D | | 21 | |
| | 22 | Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L | | 22 | |
| | 23 | Secured mortgages and notes payable to unrelated third parties | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated third parties | | 24 | |
| | 25 | 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 | | 25 | |
| | 26 | Total liabilities. Add lines 17 through 25 | | 0 | 0 |
| Net Assets or Fund Balances | Organizations that follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34. | | | | |
| | 27 | Unrestricted net assets | | 27 | |
| | 28 | Temporarily restricted net assets | | 28 | |
| | 29 | Permanently restricted net assets | | 29 | |
| | Organizations that do not follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 30 through 34. | | | | |
| | 30 | Capital stock or trust principal, or current funds | | 30 | |
| | 31 | Paid-in or capital surplus, or land, building, or equipment fund | | 31 | |
| | 32 | Retained earnings, endowment, accumulated income, or other funds | 86,416 | 32 | 107,087 |
| 33 | Total net assets or fund balances | 86,416 | 33 | 107,087 | |
| 34 | Total liabilities and net assets/fund balances | 86,416 | 34 | 107,087 | |

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

| | | | |
|----|--|----|---------|
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | 190,264 |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 169,593 |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | 20,671 |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) | 4 | 86,416 |
| 5 | Net unrealized gains (losses) on investments | 5 | |
| 6 | Donated services and use of facilities | 6 | |
| 7 | Investment expenses | 7 | |
| 8 | Prior period adjustments | 8 | |
| 9 | Other changes in net assets or fund balances (explain in Schedule O) | 9 | |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B)) | 10 | 107,087 |

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

| | | Yes | No |
|----|---|-----|----|
| 1 | 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 in Schedule O. | | |
| 2a | 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 type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis | | X |
| 2b | 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 |
| 2c | 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 in Schedule O. | | |
| 3a | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? | | |
| 3b | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits. | | |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY 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@monroecommunitykitchen.com

Website: www.monroecommunitykitchen.com

President of Board of Directors: Hope Snodgrass

Name of Executive Director: Vicki Pierce

Phone: 812-332-0999

E-Mail: director@monroecommunitykitchen.com

Name and Title of Person to Present Proposal to the Committee: Vicki Pierce, Executive Director

Phone: 812-332-0999

E-Mail: director@monroecommunitykitchen.com

Name of Grant Writer: Vicki Pierce

Phone: 812-332-0999

E-Mail: director@monroecommunitykitchen.com

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|-------------|
| 6 | 12 | Over 120/wk |

AGENCY 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

Project Name: Equipment purchase and van retrofitting

Total cost of project: \$1,169.91

Requested amount of JHSSF funding: \$1,169.91

Total number of City residents anticipated to be served by this project in 2019: 2,589

Total number of clients anticipated to be served by this project in 2019: 3,450

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

We are requesting \$1,169.91 to purchase a new commercial vacuum cleaner and to purchase awnings with which to retrofit two of our vans for better summer food service delivery. We deliver sack lunches to children in ten low-income neighborhoods each summer when school is out. The awnings will allow us to provide a small amount of shelter from sun or rain while children eat. In addition, we need another functional vacuum cleaner. Purchasing a commercial unit may help us avoid having to replace the vacuum every other year.

Address where project will be housed: 1515 S Rogers St 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 to capital improvements to real estate and if you do not own the property at which the project 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:

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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*): We do not currently have other funds expected for this project.

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds: We would order equipment as soon as an award is announced. We would be able to follow up with a claim for reimbursement and draw down funds immediately thereafter.

If completion of your project depends on other anticipated funding, please describe when those

FISCAL LEVERAGING (*100 words or less*)

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

While the vacuum won't leverage funds, we hope it eliminates the cost of purchasing replacement units as often.

The state's Summer Food Service Program will only reimburse us for lunches consumed by children in a congregate setting. A good number of children won't stay at the serving site to eat when the sun is especially hot or it's raining. When they don't stay, we aren't able to claim those meals and receive funding. By providing this relief from the weather, we will potentially increase the number of meals served according to the requirements to gain reimbursement, thereby leveraging additional funding.

funds are expected to be received:

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|--------------------------------------|------------------|
| Priority #1 | Awnings (2) @ \$289.75 | \$579.50 |
| Priority #2 | Hoover Commercial Vacuum | \$459.79 |
| Priority #3 | Awning Brackets (6) @ \$21.77 | \$130.62 |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$1169.91 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Community Kitchen addresses Strategy #5 (Public Service Assistance) of the City's Consolidated Plan 2015-19. Strategy #5 states "Provide funding to non-profit organizations that serve low income individuals/families with their basic emergency needs: food, shelter and health care." (p. 6 & 91). Within the section NA-40 Homeless Needs Assessment, funding for service providers (like Community Kitchen) is listed as the second of five priorities for the next five years (p. 50).

According to Section 504 Needs Assessment, Community Kitchen was among the top four most highly utilized Community Resources or Programs (Consolidated Plan, p.44). In addition, 53% of those Housing Choice voucher and public housing tenants responding indicated that food was the largest strain on their budget (p. 44). Not only is Community Kitchen a vital agency functioning in accordance with the City's Consolidated Plan, but we also fit into the City of Bloomington's Anti-Poverty Strategy (Consolidated Plan p.108). According to items 2 and 4, part of the plan is to 2. "provide access to emergency assistance by providing funding...to agencies that provide said services" and 4. C. "continue to cooperate with other local funders on anti-poverty strategies".

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

Community Kitchen is seeking funding for a one-time investment in equipment of a commercial vacuum cleaner and awnings with which to retrofit two of our vans for Summer Food Service delivery for children.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

We are hopeful that the addition of awnings to the delivery vans used for our Summer Food Service Program will help us feed more children and claim the funding that allows us further investment in the nutrition of the program. We know that access to food and nutrition are commonly accepted necessities for healthy individuals. Proper nutrition helps ensure success in school and age appropriate development, along with better physical and mental health. As the need for Kitchen services continues and we continue to reach more and more children through our programs, the benefits to the community are long lasting and take the form of more healthy children, better learners, lower dropout rates, lower incarceration rates and more productive citizens.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

The outcome indicator for the success of this project will be our reimbursement percentage for meals served through our Summer Food Service Program. Having no shelter from rain or sun in the past, we were only able to claim 75% of the meals we served through the program in the summer of 2018. An improvement in the percentage of the meals we are able to claim for reimbursement will be a measure of the success of this project.

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.

Community Kitchen provides a vital service to some of the community's most vulnerable residents. In 2018, CK provided 302,139 meals and snacks to community members in need. 66% of those we served were children; 13% were seniors and 10% had experienced homelessness in the previous six months. Of those patrons surveyed, 97% had income levels of extremely low- or low-income. Kitchen services really do meet a basic need of some of our most vulnerable community members, including children of low-income families. Every effort we make to reach more children in need, leverage funding sources and invest in efficiency and longevity makes a long-term impact on our ability to meet food needs in our community.

Community Kitchen
Project Budget 2019

Community Kitchen

| Item | Cost |
|---|-------------------|
| <u>2- ARB Awning 2500 8.2ft long</u> | \$579.50 |
| 6- ARB OS850 Awning bracket | \$130.62 |
| Hoover C1810-010 18" Conquest Commercial Bagless Vacuum Cleaner | \$459.79 |
| Total | \$1,169.91 |



Roll over image to zoom in

ARB AWNING 2500 8.2FT LONG

by ARB
★★★★☆ 14 customer reviews
| 18 answered questions

Price: **\$289.75 & FREE Shipping**

Get \$10 off instantly: Pay \$279.75 upon approval for the Amazon Prime Store Card.

Eligible for **amazon smile** donation.

- ARB Usa 814101
- See more product details

New (5) from \$289.75 & FREE shipping.

Report incorrect product information.

\$289.75

& **FREE Shipping**

Get it Tue, Mar 19 - Thu, Mar 21

In Stock.

Qty: 1

\$289.75 + Free Shipping

Add to Cart

Buy Now

Ships from and sold by Trends Auto.

Deliver to Timothy - Bloomington 47404

Add to List

Share

Other Sellers on Amazon

\$295.57

+ Free Shipping
Sold by: Advance Cycle Parts

\$327.56

+ Free Shipping
Sold by: MotorSport Supply

\$341.67

+ Free Shipping
Sold by: BuyAutoParts

New (5) from \$289.75 & FREE shipping.

Save on AmazonBasics and SupplyMaster Safety Gear



SupplyMaster Disposable Exam Nitrile Gloves, 400 pk \$21.87

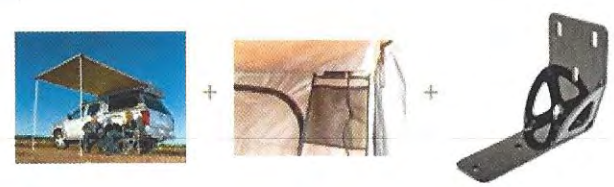


AmazonBasics Blue Light Blocking Safety Glasses, 12pk \$54.99



AmazonBasics Noise Reduction Safety Earmuffs \$9.34

Frequently bought together



Total price: **\$522.42**

These items are shipped from and sold by different sellers. Show details

This item: ARB AWNING 2500 8.2FT LONG \$289.75

Product information

Technical Details

| | |
|------------------------------|--------------------|
| Brand | ARB |
| Item Weight | 36.7 pounds |
| Product Dimensions | 8 x 8 x 105 inches |
| Item model number | 814101 |
| Discontinued by manufacturer | Yes |
| Manufacturer Part Number | 814101 |

Additional Information

| | |
|----------------------|--|
| ASIN | B0028PRXQY |
| Customer Reviews | ★★★★☆ ~ 14 customer reviews 4.0 out of 5 stars |
| Best Sellers Rank | #317,781 in Automotive (See top 100) #10 in Truck Bed & Tailgate Awnings & Shelters |
| Shipping Weight | 44 pounds (View shipping rates and policies) |
| Date First Available | April 6, 2012 |

Warranty & Support

Warranty, Parts: Parts

Product Warranty: For warranty information about this product, please click here

Feedback

If you are a seller for this product, would you like to [suggest updates through seller support](#)?
Would you like to [tell us about a lower price](#)?

Related Video Shorts (0) [Upload your video](#)



Be the first video

Your name here

Product description

Easy to mount and operate, these retractable awnings fit on to the side of a roof rack, and are conveniently stored for immediate use on arrival. Specifically designed for harsh outback conditions, the awnings are rugged but lightweight, and provide fast and convenient protection from the elements. Shade cover made from PVC lined polyester - waterproof and UV protected - self standing awning takes 30 seconds to deploy - awning is secured in a heavy duty nylon reinforced PVC bag - mounts easily to the side of most roof racks or roof bars - awning height adjustable with telescopic legs - optional mosquito net available for extra protection - comes with pegs and guy ropes for securing legs, mounting nuts and bolts, spanner and comprehensive instructions.

amazonbasics Save on Quality Gloves Shop now

Automotive > RV Parts & Accessories > Awnings, Screens & Accessories



ARB OS850 Awning Bracket

by ARB 4.5 stars 28 customer reviews | 23 answered questions

Price: \$21.77 & FREE Shipping

Get \$10 off instantly: Pay \$11.77 upon approval for the Amazon Prime Store Card.

Eligible for amazonSmile donation.

Item Package Quantity: 1

| | |
|---------|---------|
| 1 | 6 |
| \$21.77 | \$91.36 |

- Works on most roof racks, universal mount, round roof racks are a little harder to install
 - Listing is for one bracket, ARB suggest to use 2 or 3 brackets to secure the Awning
 - Three slotted 6mm holes are provided to mount the awning, the OS850 awning bracket is not supplied with hardware
- See more product details

Compare with similar items

New (3) from \$21.77 & FREE shipping.

Report incorrect product information.

Buy New \$21.77 & FREE Shipping Get it Tue, Mar 19 - Fri, Mar 22

In Stock.

Qty: 1

\$21.77 + Free Shipping

Add to Cart

Buy Now

Ships from and sold by 4Wheel Online.

Deliver to Timothy - Bloomington 47404

Buy New \$23.79 FREE Shipping on orders over \$25 Get it Tue, Mar 19 - Fri, Mar 22

Roll over image to zoom in

Save on AmazonBasics and SupplyMaster Safety Gear

Add to List

Search bar with magnifying glass icon and Search button

< Upright and Canister Vacuum Cleaners

Hoover C1810-010 18" Conquest Commercial Bagless Vacuum Cleaner

★★★★★ Item #: 430C1810010 MFR #: C1810-010



Free Shipping

Only **\$459.79**/Each

Ships free with

We will notify you when this product is available. To make sure you receive our email, please add help@webstaurantstore.com to your address book.

You will only be emailed once the product becomes available. We won't add you to our email list or share your data.

Wish List

- ✓ One pass design for greater efficiency
- ✓ Easy-to-empty dirt cup reduces downtime
- ✓ 7.0 Amps; 120V
- ✓ 18" cleaning path
- ✓ 6 position height adjustment
- ✓ Shielded V-belt helps limit downtime

UPC Code:

073502028636



Quick Shipping

Usually ships in **1 business day** ?



COMMERCIAL

[View all Hoover Upright and Canister Vacuum Cleaners](#)

You May Also Need ?



Hoover 58642015 Dirt Cup Accessory Kit for Hoover Conquest

\$63.99 /Each



Hoover 38528013 Replacement Agitator Belt For Vacuum

\$2.29 /Each

1 Add to Cart

1 Add to Cart

This Hoover C1810-010 Conquest 18" commercial bagless vacuum is the

perfect choice for cleaning in your restaurant.



Designed to get into tight spaces for a thorough clean, this vacuum presents a wide range of features that help you increase the efficiency of your cleaning processes. With a large cleaning path, an easy-to-reach on/off switch, and an easy-to-empty bagless system, this vacuum helps to reduce time spent on maintenance. Plus, it has a three position handle that can lay flat when you need to clean under beds or other low furniture.



UL Listed

This item has been tested and meets safety standards imposed by the Underwriters Laboratories (UL).



ETL US & Canada

This item meets the electrical product safety standards imposed by the ETL, a division of the Intertek Group, for use in the United States and Canada.



18" Cleaning Path

With its wide area one pass cleaning efficiency, you can count on lifting and trapping more dirt with a single pass. Its 18" cleaning path means that you can clean more with a single pass, saving time and energy.



Bagless System

Reduce downtime with this Hoover vacuum cleaner! The easy-to-empty dirt cup and bagless system eliminate the need to spend extra money and time purchasing and changing vacuum cleaner bags.



Foot Activated Switch

The convenient foot activated on/off switch requires only a touch of the foot to start and stop the machine, adding efficiency to your cleaning system. Plus, it eliminates the need for employees to bend down to turn on the machine.

Three Position Handle

You can count on this vacuum cleaner even in tight spaces. With the three position handle that lies flat to clean under low furniture like beds and chairs, this vacuum cleaner can be used anywhere.



Durable, Long-Lasting Design

This vacuum cleaner is built for durability. With the Super Tuff nylon fan, steel rear axle, shielded V-belt, and metal handle, you can count on this machine to last even through constant use. The large object clean-out trap catches large debris before it comes in contact with the fan, protecting the motor and ensuring that your vacuum cleaner continues to work properly.



Manual Height Adjustment

The 6 position manual height adjustment allows your vacuum cleaner to switch between types of floors for maximum versatility.



Non-Marking Furniture Guard

The clear non-marking furniture guard helps to protect walls and furnishings so you can clean as close to furniture as possible.



50' Power Cord

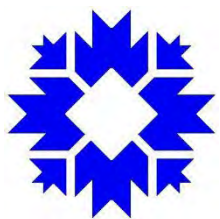
This model even features a long 50' power cord so that you can clean large areas! With a longer reach, your staff can clean longer without the need to find a new power source.

Community Kitchen of Monroe County, Inc.
Profit & Loss by Class
January through December 2018

| | Building Fund | General | TOTAL |
|--|---------------|--------------|--------------|
| Ordinary Income/Expense | | | |
| Income | | | |
| Head Start | 0.00 | 166,566.09 | 166,566.09 |
| INCOME | | | |
| Business/Professional | 0.00 | 26,069.80 | 26,069.80 |
| Church | 0.00 | 15,801.42 | 15,801.42 |
| Civic | 0.00 | 6,515.00 | 6,515.00 |
| Collection Cans | 0.00 | 1,980.55 | 1,980.55 |
| Individual Contributions | 23,350.00 | 297,824.05 | 321,174.05 |
| Interest | 0.00 | 67.28 | 67.28 |
| Special Events Income | | | |
| Brunch | 0.00 | 21,162.84 | 21,162.84 |
| Chef's Challenge | 0.00 | 14,611.76 | 14,611.76 |
| Taste of Bloomington | 0.00 | 3,500.00 | 3,500.00 |
| Special Events Income - Other | 0.00 | 3,938.50 | 3,938.50 |
| Total Special Events Income | 0.00 | 43,213.10 | 43,213.10 |
| Total INCOME | 23,350.00 | 391,471.20 | 414,821.20 |
| Grant Income | | | |
| CACFP | 0.00 | 63,052.90 | 63,052.90 |
| CDBG Grant | 0.00 | 38,298.81 | 38,298.81 |
| EFSP Grant | 0.00 | 4,368.00 | 4,368.00 |
| Local Govt./Townships | 0.00 | 26,200.00 | 26,200.00 |
| Misc. Grants/Other | 10,000.00 | 29,525.70 | 39,525.70 |
| SFSP | 0.00 | 26,668.14 | 26,668.14 |
| United Way Grant | 0.00 | 26,203.23 | 26,203.23 |
| Grant Income - Other | 0.00 | 58.38 | 58.38 |
| Total Grant Income | 10,000.00 | 214,375.16 | 224,375.16 |
| BOBPAN-Perry Twp. Pantry | 0.00 | 4,717.44 | 4,717.44 |
| CK Express Pantry-Blmtn Twp. | 0.00 | 2,000.00 | 2,000.00 |
| In-Kind Income | | | |
| Food Donations | | | |
| Food Bank In-Kind | 0.00 | 250,591.78 | 250,591.78 |
| Food Donations - Other | 0.00 | 101,889.60 | 101,889.60 |
| Total Food Donations | 0.00 | 352,481.38 | 352,481.38 |
| Labor | 0.00 | 224,419.62 | 224,419.62 |
| Non-Food Donations | 0.00 | 8,347.72 | 8,347.72 |
| Rent & Utilities | 0.00 | 7,320.00 | 7,320.00 |
| Total In-Kind Income | 0.00 | 592,568.72 | 592,568.72 |
| Income Tax Refund | 0.00 | 1,307.46 | 1,307.46 |
| Uncategorized Income | 0.00 | 0.07 | 0.07 |
| Total Income | 33,350.00 | 1,373,006.14 | 1,406,356.14 |
| Expense | | | |
| EXPENSES | | | |
| Automobile Expense | | | |
| Gas Expense | 0.00 | 2,449.11 | 2,449.11 |
| Registration & Plates | 0.00 | 708.05 | 708.05 |
| Van Repairs | 0.00 | 3.99 | 3.99 |
| Automobile Expense - Other | 0.00 | 1,776.29 | 1,776.29 |
| Total Automobile Expense | 0.00 | 4,937.44 | 4,937.44 |
| Bank Service Fees | 0.00 | 396.00 | 396.00 |
| Board Development | 0.00 | 153.23 | 153.23 |
| BOBPAN-Perry Twp Pantry | 0.00 | 4,832.82 | 4,832.82 |
| CK Express Pantry-Blmtn. Twp. | 0.00 | 1,069.74 | 1,069.74 |
| Food & Beverage Expense | | | |
| Head Start | 0.00 | 45,616.42 | 45,616.42 |
| Backpack Buddies | 0.00 | 21,691.68 | 21,691.68 |
| CACFP | 0.00 | 34,804.99 | 34,804.99 |
| SFSP | 0.00 | 15,916.95 | 15,916.95 |
| Food & Beverage Expense - Other | 0.00 | 15,734.14 | 15,734.14 |
| Total Food & Beverage Expense | 0.00 | 133,764.18 | 133,764.18 |
| Fundraising | 0.00 | 6,437.46 | 6,437.46 |
| Gen. Repairs/Maint. Svcs. | | | |
| Building Repairs | 0.00 | 650.70 | 650.70 |
| Equipment Repairs | 0.00 | 2,292.53 | 2,292.53 |
| Trash | 0.00 | 2,194.29 | 2,194.29 |

Community Kitchen of Monroe County, Inc.
Profit & Loss by Class
 January through December 2018

| | Building Fund | General | TOTAL |
|--|---------------|--------------|--------------|
| Gen. Repairs/Maint. Svcs. - Other | 0.00 | 14,567.52 | 14,567.52 |
| Total Gen. Repairs/Maint. Svcs. | 0.00 | 19,705.04 | 19,705.04 |
| Insurance | | | |
| Directors & Officers | 0.00 | 347.00 | 347.00 |
| Health Insurance | 0.00 | 30,927.30 | 30,927.30 |
| Liability & Worker's Comp | 0.00 | 1,968.04 | 1,968.04 |
| Life Insurance | 0.00 | 2,161.41 | 2,161.41 |
| Prepaid Insurance | 0.00 | 922.50 | 922.50 |
| Total Insurance | 0.00 | 36,326.25 | 36,326.25 |
| Kitchen | | | |
| Physical Plant Equipment | 0.00 | 725.35 | 725.35 |
| Physical Plant Supplies | 0.00 | 17,471.97 | 17,471.97 |
| Total Kitchen | 0.00 | 18,197.32 | 18,197.32 |
| Office Equipment | | | |
| Computer & Software | 0.00 | 2,266.99 | 2,266.99 |
| Office Equipment - Other | 0.00 | 27.92 | 27.92 |
| Total Office Equipment | 0.00 | 2,294.91 | 2,294.91 |
| Office Supplies | 0.00 | 3,765.77 | 3,765.77 |
| Organiz. Memberships/Filing Fee | 0.00 | 346.32 | 346.32 |
| Other/Contingency | 0.00 | 620.26 | 620.26 |
| Payroll Expenses | 0.00 | 379,449.04 | 379,449.04 |
| Payroll Taxes | | | |
| FICA-Company | 0.00 | 21,999.77 | 21,999.77 |
| FUTA | 0.00 | 35.78 | 35.78 |
| Medicare-Company | 0.00 | 5,145.12 | 5,145.12 |
| SUTA | 0.00 | 710.55 | 710.55 |
| Total Payroll Taxes | 0.00 | 27,891.22 | 27,891.22 |
| Postage | 0.00 | 3,158.61 | 3,158.61 |
| Printing | 0.00 | 7,216.15 | 7,216.15 |
| Professional Fees | 0.00 | 9,241.25 | 9,241.25 |
| Staff Training | 0.00 | 2,317.51 | 2,317.51 |
| Subscriptions | 0.00 | 211.25 | 211.25 |
| Telephone & internet | 0.00 | 3,043.85 | 3,043.85 |
| Utilities | 0.00 | 14,977.42 | 14,977.42 |
| Volunteer Recognition | 0.00 | 2,074.50 | 2,074.50 |
| Total EXPENSES | 0.00 | 682,427.54 | 682,427.54 |
| In-Kind Expenses | | | |
| Food Donations | | | |
| Food Bank In-Kind | 0.00 | 250,591.78 | 250,591.78 |
| Food Donations - Other | 0.00 | 93,560.53 | 93,560.53 |
| Total Food Donations | 0.00 | 344,152.31 | 344,152.31 |
| Labor | 0.00 | 224,419.62 | 224,419.62 |
| Non-Food Donations | 0.00 | 8,347.72 | 8,347.72 |
| Rent & Utilities | 0.00 | 7,320.00 | 7,320.00 |
| In-Kind Expenses - Other | 0.00 | 853.96 | 853.96 |
| Total In-Kind Expenses | 0.00 | 585,093.61 | 585,093.61 |
| Interest Expense | 33.46 | 2,285.31 | 2,318.77 |
| Reconciliation Discrepancies | 0.00 | 35.00 | 35.00 |
| Total Expense | 33.46 | 1,269,841.46 | 1,269,874.92 |
| Net Ordinary Income | 33,316.54 | 103,164.68 | 136,481.22 |
| Net Income | 33,316.54 | 103,164.68 | 136,481.22 |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Courage to Change Sober Living

Address: 5027 Lakeview Drive, Ellettsville Indiana 47404

Phone: 812-391-5440

E-Mail: c2csoberliving@gmail.com

Website: couragetochangehouse.org

President of Board of Directors: Marilyn Burrus

Name of Executive Director: N/A

Phone: 812-391-5440

E-Mail: c2csoberliving@gmail.com

Name and Title of Person to Present Proposal to the Committee: Marilyn Burrus

Phone: 812-391-5440

E-Mail: c2csoberliving@gmail.com

Name of Grant Writer: Bobby Overman

Phone: 812-320-0508

E-Mail: bobbyjpcv@gmail.com

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [] Yes [] No

***Note:** If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.*

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| | 2 | <15 |

Number of Employees:

AGENCY 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 low barrier, affordable, safe sober living, transitional housing to people affected by substance abuse disorders. Courage to Change Sober Living was founded in 2015 when a need for more transitional housing options was identified by members of the community. At that time there was a rise in opioid addiction throughout the state of Indiana making it even more important to have a broader range of housing options for those facing substance abuse disorders.

Courage to Change started with one house and has grown to four houses--two women's houses and two men's houses-allowing us to serve 18 clients at a time. Since its' inception Courage to Change has served over 75 clients with 95% of those clients being from Monroe County.

Courage to Change Sober Living applicants come from self-referral, family members, Monroe County Probation Office, Monroe County Prosecutors Office, Monroe County Correctional Facility, Indiana Department of Corrections and other substance abuse treatment facilities.

Courage to Change was founded on the belief that individuals need a safe, sober, low barrier, supportive environment in order for them to take responsibility for their recovery. We also believe these housing options should be available for all income levels.

PROJECT INFORMATION

Project Name: Fresh Start Rent Subsidy Program

Total cost of project: \$9000.00

Requested amount of JHSSF funding: \$6000.00

Total number of City residents anticipated to be served by this project in 2019: 36-40

Total number of clients anticipated to be served by this project in 2019: 36-40

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Courage to Change Sober Living is asking \$6000.00 to expand our Fresh Start Rent Subsidy program. Rent includes utilities.

Our residents face many obstacles including the financial burden of paying rent, court fees, and probation fees while transitioning out of homelessness, unemployment, incarceration or other crisis situations. CTC recognizes that substance abuse exacerbates homelessness for both individuals and families. We also recognize that homelessness can be a catalyst for substance abuse as individuals may begin using or using more heavily as a means to cope.

The Fresh Start Fund provides assistance to our residents as a one time request during their stay under the following circumstances:

1. new CTC resident.
2. resident has relapsed and after treatment the resident will return to CTC.
3. resident has lost their job and is seeking new employment.
4. drug court temporary mandated incarceration with the resident returning to a CTC house.
5. Residents must apply for the Fresh Start Fund and must meet all other requirements of our program in order to be given this one time assistance.

This program allows new residents the opportunity to secure employment and become self-sufficient in the household; allows residents who have relapsed, lost their job or who had to satisfy court mandated temporary incarceration to do so without the extra burden of becoming homeless. Courage to Change Sober Living strives to provide a holistic approach to recovery by addressing an individuals' physical needs such as food and shelter alongside the addiction.

Address where project will be housed: We rent four sober living houses so the project is not housed at one particular 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 to capital improvements to real estate **and** if you do not own the property at which the project 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.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*): Sober Joe Coffee donates \$3000.00 a year to support the Fresh Start Program. Sober Joe Coffee was started to support Sober Living Houses including Courage to Change Sober Living.

Please 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 when we receive an application from someone applying to become a resident and we have accepted them to become a resident or someone who is already a resident of a CTC house who has come into a crisis situation and needs rent help.

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.

Courage to Change leverages other sources of funding in order to ensure sustainability including individual donations and funding from Sober Joe Coffee. Courage to Change is a young nonprofit and as such is seeking a more diversified approach to fundraising including donations, township trustees, grants and partnerships with local landlords.

Sober Joe Coffee is a local business that partnered with Courage to Change in starting the Fresh Start rent subsidy program a year ago after seeing the need for subsidies for those unable to afford the first month rent thus making them ineligible for acceptance into the program.

With this grant we are hoping to expand our Fresh Start program which will make it possible for us to offer this rent subsidy to more of our residents throughout the year not only for new residents but also for those who are unable to pay their rent at one point during their stay for the reasons outlined in this grant application.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, will you be able to proceed with partial funding?

Yes No

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

| | Item | Cost |
|------------------------|-----------------------------------|----------|
| Priority #1 | One month rent paid for residents | \$500.00 |
| Priority #2 | Two weeks rent paid for residents | \$250.00 |
| Priority #3 | One week rent paid for residents | \$125.00 |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

According to SCAN 2012 , key findings from the major social service agencies report major issues for their clients include paying the rent, finding a good job, paying for legal issues, paying for clothing and utilities and dealing with stress, anxiety and depression. SCAN also reports that persons suffering from addiction often have a low level of job skills and low level of education. SCAN continues to find that the essentials for our population are the basic needs including sufficient food, a stable place to live, health care and wellness and crisis management skills. Barriers like unemployment, low wages, exposure to violence and substance abuse prevent individuals from meeting these basic needs.

In the HAND 2015-2019 report the need for affordable housing exceeds the availability for all persons. The executive summary outlines strategies including strategy number 5 under Public Service Assistance: provide funding to nonprofit organizations that serve low income individuals/families with their basic needs of food, shelter and health care; provide funding to nonprofit organizations that provide a safety net for community members in need; provide funding to nonprofit organizations that provide valuable services to improve quality of life.

Courage to Change and the Fresh Start Fund acts as a bridge to those coming out of the criminal justice system in particular who leave without funds or means to pay rent, have barriers to finding employment and who are in need of safe, sober, transitional housing until they can become more stable in their recovery, find employment and feel ready to secure housing on their own.

Recidivism is a huge problem in our community and lack of housing along with addiction and lack of employment is directly related to our recidivism rates. Our residents have a difficult time finding landlords who will rent to them especially coming directly from prison or jail. By living in one of our houses, residents start to build up a history of paying rent, having a job, being in a stable environment and making community connections.

The Fresh Start Rent Fund helps our residents enter into our program and stay in our program by paying their rent for one month. While helping with a months rent may not seem like much it can mean the difference between becoming homeless, maintaining a job, staying in compliance with the court system and maintaining sobriety.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your

project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

We are requesting operational funding for our Fresh Start Rent Subsidy fund because our ability to pay rent drives our ability to provide our services. Courage to Change Sober Living rents houses in our community in order to provide low barrier, safe and sober transitional housing to residents of Monroe County. We currently run four houses—two men’s house and two women’s houses. Simply put, if we can’t pay our rent we can’t provide our services.

Courage to Change is a good tenant and serves as an example of sober living houses that exist in neighborhoods throughout the city of Bloomington, are good neighbors and can hopefully serve to remove some of the stigma many people have surrounding sober living houses. It isn't always easy to get landlords to rent to us because of this stigma. Slowly but slowly that is changing because of our track record of being good tenants.

The Fresh Start program is an acknowledgement that there are times when our residents encounter obstacles to paying their rent each month. CTC strives to keep our residents in our houses so they can remain living in a safe and sober environment with guidance and support from staff and their peers. Courage to Change understands the stakes are high for our residents if they do experience homelessness or have to live in an unsafe living environment. Homelessness can trigger substance abuse which can then begin the cycle of incarceration again.

The Fresh Start Program gives our residents some breathing room—either immediately upon being released from jail or prison when they have no resources to call upon or when a crisis situation happens and they are unable to pay that months rent. Our residents understand we will work with them to get back on track by providing them with rent assistance so they can concentrate on finding employment, taking care of probation demands, getting back in compliance with drug court without worrying on where they are going to live.

Future funding will consist of support from Sober Joe Coffee, grants, donations from individuals, fundraising and the township trustees have given money to our residents in the past for a month’s rent on an irregular basis but we are in the process of speaking with the Bloomington Township Trustees as well as Perry Township in order to see if this can be on a more regular basis.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Having a stable home will provide some of the first steps in breaking down barriers that individuals who experience substance abuse disorders face. Once individuals have access to stable housing in a safe and sober environment Courage to Change will also work with other community organizations to help further sustain sober living.

By providing a safe and sober living environment for individuals Courage to Change Sober Living is also impacting the community as a whole in many ways including allowing our residents to concentrate on their recovery without worrying about becoming homeless, allowing them to reconnect with their family, better employment rates, better health and a feeling of connection to the community. This helps to alleviate the financial cost of the cycle of addiction, homelessness and recidivism. The community benefits as well when everyone feels connected and are part of contributing to the community.

95% of the clients Courage to Change serves are from Monroe County. Since 2015 we have served over 75 clients. Starting with one house we have grown to 4 houses—two women's and two men's which allows us to serve 18 clients at a time. Residents sign an agreement to stay in a house for a minimum of three months with an average stay of six. We serve 18 clients at a time but over the year we serve more than 18 clients depending on how quickly our clients feel ready to transition to living on their own.

The Fresh Start rent subsidy program allows us to give more residents the ability to enter our program as first time residents or stay in our program if circumstances lead them to not being able to pay that month's rent. Most if not all of our residents come to us without anything—no money, no family ties, no job. This program gives them the help they need until they become more stable in their recovery and in their employment situation.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

This funding request will be used to expand our Fresh Start Rent Subsidy Fund so that we are able to provide more of our residents with rent help during their stay.

Short term indicators include how many new residents will be able to enter our program with their rent paid for the first month; how many residents who have to leave our houses due to relapse or temporary incarceration will be able to take advantage of this fund and won't have to worry about rent while they deal with the issue that caused them to leave our houses temporarily and residents who have lost their job but are seeking new employment without worrying about becoming homeless.

We will be able to measure how many of our residents who received money from the Fresh Start Fund got their lives back on track, remained living in our houses beyond the month of help, dealt with whatever crisis may have caused them to not be able to pay rent and how this Fresh Start Fund helped them to stay focused on their recovery instead of worrying about seeking a new place to live.

Our house managers hold weekly house meetings with our residents and ask the types of questions that will allows CTC to measure how much of an impact the Fresh Start Rent Subsidy Fund has had on an individual.

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.

I wanted to expand on how Courage to Change manages the Fresh Start Fund and why we feel it is so important to the work we do.

Requirements of our program include agreeing to stay a minimum of three months, finding employment within two weeks, enrolling in a treatment program, attending AA or NA meetings, remaining sober, attending house meetings and following the rules of our CTC houses. The hardest steps for our residents are paying rent and finding employment. Most come to us from the criminal justice system and arrive without money, clothes, transportation or family connections.

CTC works with other social service agencies and nonprofit organizations to locate resources such as job placement, clothing and bus passes. But we know this is a lot to take on the first month they have arrived at one of our houses let alone also worrying about how they will pay rent. Many are getting used to just being back in society so worry about how they will pay they rent leads to a lot of stress and anxiety which can be a trigger for relapse.

Residents apply for the Fresh Start Fund one time during their stay. Most use it the first month they come to us since that is the most vulnerable time for them. And becoming stable in that first month is so important to their continued sobriety.

The Fresh Start Fund helps alleviate some of this stress and lets the resident know we are supporting them by offering them this fresh start and by giving them the opportunity to get their feet under them.

We hope you will help us to expand our program as we believe it is a very important part of the work we do.

Courage to Change Sober Living Fresh Start Rent Subsidy Budget

Total Amount of Grant: \$6000.00

Rent subsidy award: \$500 per resident

This grant will pay for two residents' rent per month until the monies are completed by December 3rd of 2019.

Courage to Change Sober Living

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **DEC 08 2016**

COURAGE TO CHANGE SOBER LIVING
500 W FOURTH ST
BLOOMINGTON, IN 47408-0000

Employer Identification Number:
81-3870837
DLN:
26053740001796
Contact Person:
CUSTOMER SERVICE ID# 31954
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
509(a)(2)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
August 27, 2016
Contribution Deductibility:
Yes
Addendum Applies:
No

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.

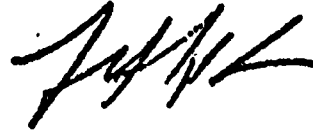
If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. 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.

Letter 947

COURAGE TO CHANGE SOBER LIVING

Sincerely,

A handwritten signature in black ink, appearing to read 'J. Cooper', written in a cursive style.

Jeffrey I. Cooper
Director, Exempt Organizations
Rulings and Agreements

Letter 947\

Courage to Change Sober Living Estimated Operating Budget

Fiscal Year 2018-2019

EXPENSES

Salary & Wage Expenses

Men's House Manager Wages: 20 hours a week@10 dollars an hour \$10,400

Women's House Manager Wages: 20 hours a week@10 dollars an hour \$10,400

Total Salary & Wage Expenses \$20,800

Administrative Expenses

Office/Mailing Supplies \$100

Advertising/Website \$200

Insurance \$2640

Subscriptions \$300

Bookkeeping/taxes \$350

PayPal fees \$100

Total Administrative Expenses \$3690

Client Care Expenses

Client Care (move in package of essentials) \$700

Drug Tests \$700

Transportation \$200

Total Client Care Expenses \$1600

Rental Housing Expenses

| | |
|--------------------------------------|----------|
| Housing leases | \$60,000 |
| Utilities | \$15,000 |
| Repairs/Damage/Replacement | \$1000 |
| Furnishings for houses/beds/supplies | \$500 |
| <hr/> | |
| Total Housing Expenses | \$76,500 |

TOTAL ESTIMATED EXPENSES \$ 102,590

REVENUES

Restricted Grants

Grants for Staff Salaries

| | |
|-----------------------------|----------|
| Cares Grant | \$3052 |
| Smithville Foundation Grant | \$12,800 |

Total Restricted Grants for Staff Salaries Fund \$15,852

Grants for Rent Scholarship Fund

| | |
|--|--------|
| Sophia Travis Grant (spent for the year) | \$1800 |
| Sober Joe Coffee Support | \$3000 |
| <hr/> | |

Total Restricted Grants Rent Scholarship Fund \$4800

Donations/Fundraising Activities \$5000

Rental Income \$80,000

TOTAL INCOME

\$105,652



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Girls Inc. of Monroe County

Address: 1108 W 8th Street, Bloomington, IN 47404

Phone: 812-336-7313

E-Mail: astark@girlsinc-monroe.org

Website: girlsinc-monroe.org

President of Board of Directors: Elizabeth Bodamer

Name of Executive Director:

Phone: 812-336-7313

E-Mail: astark@girlsinc-monroe.org

Name and Title of Person to Present Proposal to the Committee: Amy Stark, Executive Director

Phone: 812-336-7313

E-Mail: astark@girlsinc-monroe.org

Name of Grant Writer: Sonja Meintsma

Phone: 812-336-7313

E-Mail: smeintsma@monroe.girls-inc.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 4 | 7 | 109 |

AGENCY 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.

Girls Inc. of Monroe County inspires all girls to be strong, smart, and bold. We believe that the Girls Inc. experience equips girls to navigate gender, economic, and social barriers and to grow into healthy, educated, and independent adults. Our organization specifically focuses on girls ages 5-18 that live within Monroe County by tailoring our offered programs to their needs.

Girls Inc. of Monroe County's vision is to commit our services through a unique girls-only environment; creating an inclusive environment consisting of adult mentors, career women, and girls. At Girls Inc., we promote learning services that aim to overcome gender discrimination, social inequity, and other barriers to success. Our programming provides opportunities for girls to build skills and capabilities to become responsible, confident, and self-sufficient adults. Our diverse programming focuses on finance and STEM educational activities, healthy living and nutrition, physical activity and team building, healthy relationships and self-confidence. At Girls Inc., we support girls from all socioeconomic and ethnic backgrounds, with a targeted focus on girls who come from low-income or split-family situations.

PROJECT INFORMATION

Project Name: Safety & Security

Total cost of project: \$20,000

Requested amount of JHSSF funding: \$20,000

Total number of City residents anticipated to be served by this project in 2019: 500+

Total number of clients anticipated to be served by this project in 2019: 600+

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

We are requesting \$20,000 to install a comprehensive security system at the Girls Inc. of Monroe County center. Our goal is to create a safer and more secure environment for our girls, volunteers, and staff. The security system will enable Girls Inc. to guarantee that all girls who participate in our programs will be in an environment dedicated to their safety as much as to their development and education. This security system will encompass the entire Girls Inc. campus (both the gymnasium and the learning center), and will be equipped with remote access control. The access control will be a significant improvement to our existing security system, as it will allow Girls Inc. employees to be aware of anyone attempting to gain entrance to the facility through the use of a doorbell system. Additionally, access can be remotely turned off in the case that a card or key fob is lost. Finally, this system will enable Girls Inc. to establish a closer and more accessible relationship with the local police and fire departments.

Address where project will be housed: 1108 W 8th Street, Bloomington, IN

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 to capital improvements to real estate and if you do not own the property at which the project 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 - Girls Inc. of Monroe County owns the property.

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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

N/A

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

Currently, Girls Inc. is requesting this funding solely from Jack Hopkins.

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

Currently, Girls Inc. has two estimates from two different companies (B-Tech and Koorsen) regarding needed updates and installation costs of a new security system. These estimates were done in 2017 and must be updated before Girls Inc. commits to an installation package. Once the new estimates are completed, Girls Inc. will need to make a decision about which system to install. Once that decision has been made, we will be prepared to draw upon the funds. Reimbursement claims will be submitted following that--our best estimate is to request reimbursement funds in August or September, 2019.

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 purchase of the security system is a one-time investment and will not require additional funds, contributions, or volunteer hours.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, **will you be able to proceed with partial funding?**
 Yes No

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

| | Item | Cost |
|--------------------|------|------|
| Priority #1 | | |
| Priority #2 | | |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

This project will enable Girls Inc. to provide a safe and secure learning center. Providing a secure area will improve the trust of our girls' families to ensure the well-being of the girls while they are engaging with our programs. Whether they are learning computer skills in our computer lab, learning to cook in our kitchen, or playing volleyball in the gym, Girls Inc. strives to provide the resources Monroe County girls need to succeed and thrive in our community. Installing a comprehensive security system will create an even safer environment for our inclusive space and will facilitate better learning outcomes for girls of all income levels and ages.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

The purchase of a security system with access control is a one-time investment requiring few maintenance and operations costs. Installation costs of equipment purchases, labor, and technology installations are all one-time purchases. There are monthly costs associated with the system; however, Girls Inc. will use our operational funds to cover those ongoing costs

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Investing in a comprehensive security system with access control will provide a safer environment in which for Girls Inc. girls to learn. This promotes greater trust between our participants and their guardians; allowing the girls to grow in an inclusive space. Research supports the assertion that safer environments facilitate better learning outcomes. Girls Inc. girls will be more involved in our programs, will be better learners in school, and will be more prepared for life after school because of the knowledge, social skills, and self-confidence gained by participating in our programs.

Additionally, employees and staff will be less stressed over safety concerns while youth are in the buildings. Additional security provisions will also reduce liability for Girls Inc. in the case of a safety incident. Finally, Girls Inc. will be better connected to security services like the police and fire departments in cases of emergency.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

All girls who participate in our programs (approximately 600) will have improved access to a safer environment in which to thrive, grow, and learn in.

All 120 Girls Inc. staff and volunteers will have improved access to a secure environment, ensuring that they feel safer and more secure while working.

Volunteers will feel less stressed while monitoring for safety and security while working with girls in both the gymnasium and learning center.

Girls Inc. will have improved access to police and fire services and will experience less liability in the case of emergencies.

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.

Senior Security Consultant

Richard Phillips

richard.phillips@koorsen.com

P: 317-224-7678

Girls INC.
June Taylor

1108 West 8th Street
Bloomington, IN 47404

Thank you for the opportunity to introduce Koorsen Fire & Security. With our company breadth and knowledge we are able to provide total protection from one source, helping you to service all your fire, security, and communication needs through one vendor saving you both time and money. In addition, we are able to provide you with 24/7 unparalleled local support and service allowing you peace-of-mind.

We take pride in our customer service when so many of our competitors are all about maximizing profits at the expense of the customer, allowing you to become vulnerable to code violations, property damage or worse. We are the experts in the life safety industry with over 65 years of experience, NICET level trained technicians and engineers, expert knowledge on both federal and local codes and boasts one of the industry's largest training centers in the country. We take our jobs seriously and are committed to our customers.

Attached is a proposal for your review, I would enjoy the opportunity to further explain our capabilities and answer any questions you may have concerning any details provided hereafter.

I look forward to working with you and your team. Please feel free to contact me with any questions.

Sincerely,
Richard Phillips
Senior Security Consultant



Q U O T A T I O N

Site Address:

Girls INC.
June Taylor
1108 West 8th Street
Bloomington, IN 47404

Number AAAQ5802

Date Jan 18, 2017

Scope of Work

ACCESS BUILDING 1

Install Access Control on inner vestibule entrance. Install access reader in vestibule. Provide locking door hardware on 1 leaf. Install access reader on rear door. Install door strike into frame utilizing existing crashbar. Control panel will be installed in office area. Network connection will be required for online interface. Provide Hosted Access Control online interface.

ACCESS BUILDING 2

Install Access control on out swinging door. Install access reader. Provide electronic locking hardware. Install Access Control on active leaf of gymnasium door. Install access reader. Provide locking hardware. Install crashbar on back entrance door. Network connection required for online interface. Provide Hosted Access Control online interface.

PROVIDE 100 ACCESS CARDS

INTRUSION BUILDING 1

Install door contacts on main entrance outer vestibule doors. Install door contact on rear door. Install Motion detector to protect office area. Install security keypad at main entrance for arming/disarming. Provide TOTAL CONNECT interface. Provide cellular communication.

INTRUSION BUILDING 2

Install door contacts to main entrance double doors. Install door contacts to gymnasium double doors. Install door contact on rear exit door. Install motion detector to protect office area. Install keypad at main entrance for arming/disarming. Provide TOTAL CONNECT interface. Provide cellular communication.

Proposed Equipment / Services

| Qty | Description |
|-----|--------------------------------|
| 2 | 1-DOOR/METAL-ENC/BAT/PWRSUPPLY |
| 2 | ONE DOOR ADD ON BOARD |
| 4 | SMALL MULL PRX W/3 COLOR COVRS |
| 1 | 9600-12/24-630 |
| 100 | PROXCARDII INTERNAL #MATCHSEEX |

The data contained in this proposal has been submitted in confidence. Customer will not disclose or permit disclosure of any information in this document without the prior written consent of Koorsen Fire & Security or use or permit the use of such information or data to compete with Koorsen Fire & Security in any manner.

Koorsen®

FIRE & SECURITY

| Qty | Description | | |
|-----|---|---------|--------------------|
| 1 | PRFSN18/4+22/12STR CMP 1OAS 1M | | |
| 2 | EXPAND 8 ZONE PLUS SERIES W/ENCLOSURE | | |
| 2 | 4G RADIO UNIVERSAL W/ X-FORMER | | |
| 2 | LCD KEYPAD CUST ALPHA PROG RF | | |
| 8 | 1-ZN THIN DR/WN X-MTTR MAG WHT | | |
| 2 | 35X40 WIRELESS PIR 80LB PI SEL | | |
| 1 | 22/4 STR JKT CL2P 1M BX WHT | | |
| 1 | Miscellaneous conduit & Fittings | | |
| 1 | Labor | | |
| | Commercial Burg Monitoring Base (Optional - SELECTED) | \$59.98 | Monthly |
| | Commercial Burg Cell Monitoring (Optional - SELECTED) | \$24.00 | Monthly |
| | Total Connect (Optional - SELECTED) | \$10.00 | Monthly |
| | Koorsen Cloud Access Base (includes 1st Door) (Optional - SELECTED) | \$24.99 | Monthly |
| | Koorsen Cloud Access Additional Door (Optional - SELECTED) | \$15.00 | Monthly |
| | Recurring Amounts Selected: | | |
| | <i>\$133.97 Monthly</i> | | |
| | Total | | \$20,116.88 |

Payment Options

Select your preferred payment option / purchase terms*:

- Terms Purchase (purchase amount \$20,116.88), [plus \$133.97 monthly]
- Lease \$20,116.88. 24 month lease, \$1 Buyout purchase option, 24 monthly payments of \$961.59
- Lease \$20,116.88. 36 month lease, \$1 Buyout purchase option, 36 monthly payments of \$669.89
- Lease \$20,116.88. 48 month lease, \$1 Buyout purchase option, 48 monthly payments of \$543.16
- Lease \$20,116.88. 60 month lease, \$1 Buyout purchase option, 60 monthly payments of \$462.69

* If this quote contains lease payment options, the lease options are provided as an estimate only. Final lease payment amount is subject to credit verification and applicable taxes as required by law.

The data contained in this proposal has been submitted in confidence. Customer will not disclose or permit disclosure of any information in this document without the prior written consent of Koorsen Fire & Security or use or permit the use of such information or data to compete with Koorsen Fire & Security in any manner.

KOORSEN FIRE & SECURITY TERMS AND CONDITIONS

AGREEMENT. Prices per this quotation are in effect for 30 days from the date of this quote. This Agreement shall become effective upon the execution by Customer and acceptance and execution of this Agreement by a duly authorized representative of Koorsen Fire & Security. This Agreement constitutes the entire agreement between the parties and supersedes any previous agreement, understanding or order between the parties. Should the terms and conditions of any purchase order of Customer issued in connection with this Agreement conflict with the terms contained in this Agreement or add any new terms to this Agreement, such new terms or different terms shall be of no force or effect. No modification or waiver of the terms of this Agreement shall be binding unless made in writing and signed by both parties. This Agreement is made and entered into in the State of Indiana and shall be in all respects governed by and construed in accordance with the laws of the United States and the State of Indiana as if entirely performed in Indiana and without regard to any conflict of law rules and without regard to any rules of construction or interpretation relating to which party drafted this Agreement. This Agreement may not be assigned by Customer directly or indirectly (including, without limitation, by merger or sale of stock) without the prior written consent of KFS, which consent may be withheld by KFS, in its sole discretion, for any reason or no reason.

SALE OF INSTALLATION AND/OR EQUIPMENT. KFS shall sell to Customer and the Customer shall purchase from the KFS the installation ("System") and/or equipment ("Equipment") identified on the front of this Agreement. All shipments, unless otherwise specified, are quoted F.O.B. origin and may be subject to additional "hazardous material" charges or other special shipping and handling fees.

PURCHASE PRICE AND PAYMENT. Customer agrees to pay KFS the purchase price for the Equipment and/or Services set forth on the proposal or as otherwise set forth on the KFS's invoice. All charges shall be paid "NET 25 DAYS" from the date of invoice, unless otherwise specified on the invoice. If KFS retains a collection agency, legal counsel, or incurs any out-of-pocket expenses to collect overdue payments, all such collection costs shall be paid by Customer. Customer acknowledges that, other than KFS's completion of installation of a System, payment to KFS is not contingent on any occurrence, matter or event, including, without limitation, Customer's receipt of payment from any third party such as an owner or insurance company.

ALLOCATION OF RISK OF LOSS. Any risk of loss associated with the Equipment remains with KFS until the goods arrive at the place of delivery. After the goods arrive at the place of delivery, the risk shall be exclusively that of the Customer. The risk of loss remains with the Customer, even regarding Equipment that is subsequently returned to KFS, until receipt by KFS.

JOBSITE, APPROVAL AND PERMITS. Unless otherwise specified, Customer shall provide, at Customer's expense, all approvals and permits required by applicable law. Customer will make premises available without interruption during KFS normal working hours, 8:00 A.M. to 4:45 P.M., exclusive of Saturdays, Sundays, and holidays. Customer understands that the installation will necessitate drilling into various parts of the premises. KFS intends, generally, to conceal wiring in the finished areas of the premises, however, there may be areas in which due to construction, decoration, or furnishing of the premises, KFS determines, in its sole discretion, that it would be impractical to conceal the wiring and in such cases, wire will be exposed. Customer agrees to provide 110 AC electrical outlets at designated locations for equipment requiring AC power. Customer agrees to provide for lifting and replacing carpeting, if required, for installation of floor mats or wiring. Customer has the authority to engage KFS to carry out the installation in the premises. The Customer agrees to furnish any necessary electric current through the Customer's meter and at the Customer's own expense. Customer will obtain and keep in effect all permits or licenses that may be required for the installation and operation of the system. Customer has the affirmative duty to inform KFS, prior to beginning of installation, of every location at the premises where KFS' employees or agents should not (because of concealed obstructions or hazards such as pipes, wires or asbestos) enter or drill holes. If asbestos or other health hazardous material is encountered during installation, KFS will cease work until Customer, at its

sole expense, obtains clearance from a licensed asbestos removal or hazardous material contractor and that continuation of work will not pose any danger to KFS personnel. In no case shall KFS be liable for discovery or exposure of hidden asbestos or other hazardous material, and Customer shall indemnify and hold KFS and its employees harmless from any claims brought against KFS and/or its employees by third parties for damages, personal injury, death, emotional injury, whether actual or prospective, allegedly caused by the presence, spread, ingestion or inhalation of any substance/vapor on or originating from Customer's premises.

GRANT OF SECURITY INTEREST. Customer, on behalf of the owner and Customer, grants to KFS a security interest in the System or Equipment to secure payment of the purchase price and grants to KFS an irrevocable power of attorney to execute and file UCC-1 Financing Statements on behalf of Customer for the benefit of KFS, as secured creditor, to protect the security interest. Upon payment in full of the purchase price, and all associated costs and charges required under this Agreement, title to the system shall pass to Customer. KFS shall have all of the rights of a secured creditor under the Uniform Commercial Code including the right to enter Customer's premises and to disable or remove the System and equipment, or both.

LIMITED WARRANTY- *Unless otherwise stated, any part of the system, including the wiring, installed under this Agreement which proves to be defective material within one (1) year of the date of completion of installation will be repaired or replaced at KFS' option with a new or functionally operative part. Labor required to repair or replace such defective components or to make mechanical adjustments to the system will be free of charge for a period of ninety(90) days following the completion of the original installation. This warranty is extended only to the original consumer purchaser of the system and may be enforced only by such person. To obtain service under this warranty, call or write our local KFS Service Department at the telephone number or address found in your local yellow pages. This warranty is void if the system is inspected, tested, or serviced by anyone other than Koorsen Fire & Security during the warranty period. THE ABOVE LIMITED WARRANTY IS IN LIEU OF ALL OTHER EXPRESSED WARRANTIES. THERE ARE NO WARRANTIES WHICH EXTEND BEYOND THE FACE HEREOF, AND KFS DISCLAIMS ANY IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE*

BREACH BY KFS. Customer expressly agrees that no action at law or in equity shall be maintained by Customer against KFS for KFS's alleged breach of this Agreement or violation of any federal or state law now in effect or hereafter enacted with respect to any obligation or duty incurred under this Agreement by KFS, unless: (i) Customer notifies KFS in writing at the address specified in this Agreement within ten (10) days from date of such alleged breach or violation, and provided KFS does not remedy or correct the breach or violation within sixty (60) days from the receipt of the notice; and (ii) such action at law or in equity is commenced by Customer within one (1) year from the finished date of the installation of the System.

LIMITATION OF LIABILITY. THE AMOUNTS PAYABLE TO KFS HEREIN UNDER ARE BASED UPON THE VALUE OF THE SERVICES AND THE SCOPE OF LIABILITY AS HEREIN SET FORTH AND ARE UNRELATED TO THE VALUE OF THE CUSTOMER'S PROPERTY OR PROPERTY OF OTHERS LOCATED IN CUSTOMER'S PREMISES. IT IS IMPRACTICAL AND EXTREMELY DIFFICULT TO FIX THE ACTUAL DAMAGES, IF ANY, WHICH MAY PROXIMATELY RESULT FROM FAILURE ON THE PART OF KFS TO PERFORM ANY OF ITS OBLIGATIONS HEREUNDER. THE CUSTOMER DOES NOT DESIRE THIS CONTRACT TO PROVIDE FOR FULL LIABILITY OF KFS AND AGREES THAT KFS SHALL BE EXEMPT FROM LIABILITY FOR LOSS, DAMAGE OR INJURY DUE DIRECTLY OR INDIRECTLY TO OCCURRENCES, OR CONSEQUENCES THEREFROM WHICH THE SERVICE OR SYSTEM IS DESIGNED TO DETECT OR AVERT. IF KFS SHOULD BE FOUND LIABLE FROM LOSS, DAMAGE OR INJURY DUE TO A FAILURE OF SERVICE OR EQUIPMENT IN ANY RESPECT, ITS LIABILITY SHALL BE LIMITED TO A SUM EQUAL TO 10% OF THE ANNUAL SERVICE CHARGE OR \$500.00, WHICHEVER IS GREATER, AS THE AGREED UPON DAMAGES AND NOT AS A PENTALTY, AS THE EXCLUSIVE REMEDY, AND THAT THE

PROVISIONS OF THIS PARAGRAPH SHALL APPLY IF LOSS, DAMAGE OR INJURY, IRRESPECTIVE OF CAUSE OR ORIGIN, RESULTS DIRECTLY OR INDIRECTLY TO PERSON OR PROPERTY FROM PERFORMANCE OR NONPERFORMANCE OF OBLIGATIONS IMPOSED BY THIS CONTRACT OR FROM NEGLIGENCE, ACTIVE OR OTHERWISE, OF KFS, ITS AGENTS OR EMPLOYEES. FOR REPAIR, TESTING, OR INSTALLATION OF ANY SPRINKLER SYSTEM AND ITS PARTS, IT IS CUSTOMER'S RESPONSIBILITY TO SHOW KFS ALL DRAIN VALVES, INCLUDING THOSE HIDDEN ABOVE THE CEILING OR IN A WALL. KFS WILL NOT BE RESPONSIBLE FOR WATER DAMAGE CAUSED FROM ANY UNDISCLOSED DRAIN VALVE, WHETHER OR NOT IT WAS KNOWN TO CUSTOMER.

INDEMNIFICATION. Customer indemnifies KFS, holds KFS harmless, and agrees to defend KFS from and against any and all lawsuits, proceedings (including, without limitation, civil, criminal, administrative and investigative proceedings, whether threatened, pending or completed), claims demands, losses, damages (including, without limitation, indirect, direct, special and consequential damages and insurance deductibles), actions, liabilities (including without limitation, strict liability and joint and several liability), costs and expenses (including, without limitation, fines, penalties and the reasonable costs of investigation, court costs, costs of arbitration, costs of appeal, and reasonable attorneys' fees) (collectively referred to as "Damages") arising out of or relating to, directly or indirectly: a breach of the Agreement by Customer; or the action or inaction of KFS in the performance of the installation of the System; provided that this provision shall not apply to Damages arising out of or relating to the recklessness or willful misconduct of KFS, when deemed by a court of competent jurisdiction to have materially and directly contributed to the Damages. As used in this paragraph, the term "KFS" shall include KFS's employees, agents, representatives, shareholders, officers, directors and subcontractors, at any level, and the subcontractors representatives, agents, employees, shareholders, officers and directors. This provision shall survive completion of the work and the termination of the Agreement, for any reason.

INSURANCE. IT IS UNDERSTOOD THAT KFS IS NOT AN INSURER, THAT IT SHALL SPECIFICALLY BE THE OBLIGATION OF CUSTOMER TO PURCHASE ANY INSURANCE WHICH CUSTOMER DESIRES TO PROTECT ITSELF FROM LOSS, DAMAGE OR INJURY DUE DIRECTLY OR INDIRECTLY TO OCCURRENCES OR CONSEQUENCES THEREFROM, WHICH THE SERVICE OR SYSTEM IS DESIGNED TO DETECT OR AVERT.

SUBROGATION. Each party waives rights of subrogation against the other party to the extent of their respective first party insurance coverages, for any and all losses suffered by either party, whether or not caused by the negligence of the Customer or KFS or those for whom they are responsible; provided that this release shall be in force and effect only with respect to loss or damage occurring during the time each parties' insurance policies contain a clause to the effect that this release shall not affect said policies or the right of the insured to recover.

CONSENT TO VENUE. Customer consents to the exclusive jurisdiction and venue of Courts of the State of Indiana and Marion County with respect to the enforcement of this Agreement, the collection of any amounts due under this Agreement or any disputes arising under this Agreement. Customer agrees that effective service of process may be made upon Customer by U.S. Mail at the address on the front of this Agreement.

USE OF DESIGNS AND DATA. Any knowledge or information, including drawings and data, which KFS shall have disclosed or may hereafter disclose to Customer, incident to installation of the System, shall be deemed to be KFS's confidential and proprietary information and Customer shall take any and all steps as are reasonable to protect the confidentiality of such information and shall not disclose to any other person, or use, such information. KFS does not grant to Customer any reproduction rights or any rights to use such information.

SERVICES NOT INCLUDED.

When a labor price is submitted, it is based on all work being performed during a five (5) day forty (40) hour work week. If overtime or premium time is performed, an additional charge will be made to the Customer. Normal work weeks are 8 a.m. to 4:45 p.m., Monday through Friday, except holidays.

Unless otherwise specifically provided in the Proposal, Customer agrees to do all necessary patching of masonry work, painting, carpentry work and the like.

If applicable, Customer shall also provide a wiring, conduit and labor to connect the provided pressure switches to an equipment to be turned on or off such as alarms, motors, conveyors, fans or cooking equipment.

If applicable, Customer shall also provide necessary hardware and linkage to permit automatic closing of doors, windows, duct dampers, etc, upon actuation of any provided pressure release trip device. Unless specifically indicated in the Proposal, services do not include costs for any discharge or concentration tests required by approval authorities.

No provision to exhaust any discharged agent is included in this Proposal. Should an employee of KFS be required to attend a "right to know" session at Customer's location, a surcharge will be added to the final invoice.

THIS PROPOSAL/ESTIMATE IS BASED ON NON-UNION WAGES. IF KFS IS REQUIRED TO PAY DIFFERENT WAGES, SUCH AS PREVAILING WAGES UNDER THE GUIDELINES OF THE US DEPT. OF LABOR, FOR ANY PORTION OF THIS WORK, KFS RESERVES THE RIGHT TO REPRICE ACCORDINGLY.

MECHANICS' LIEN NOTICE. Where KFS is a subcontractor, the Customer acknowledges, agrees and personally accepts service of this Agreement on behalf of the owner of the real property at which the System is to be installed and understands KFS's intention to file a Mechanic's Lien if and when KFS is not paid. The subcontractor is KFS, and the contractor is the Customer, and the amount claimed will be the balance due under this Agreement and any amendments or change orders as of the date of filing a Mechanic's Lien claim. Customer agrees to promptly notify the owner of the premises on which work is to be performed of this Mechanics' Lien Notice.

Koorsen Fire & Security

Title

Date

Purchase Order #

Customer Acceptance

Title

Date

Customer Name Printed



EXECUTIVE SUMMARY

Koorsen Fire & Security was founded in Indianapolis, Indiana in 1946 and is a third-generation, family-owned business. Over the years, Koorsen has become one of the largest and most respected fire protection and security companies in the United States with annual sales exceeding \$80 million.

With over 25 locations and nearly 800 associates, Koorsen is able to design, install, engineer, program, service and repair virtually all fire and security products, making it one of the only companies in the United States that can truly offer commercial and residential customers total protection from one source.



OUR FAMILY OF SERVICES

- Fire Extinguisher
- General Fire Products
- Emergency/Exit Lighting
- Fire Alarm
- Fire Sprinkler
- Kitchen Fire Suppression
- Security – Commercial & Residential
- Communications
- Monitoring

THE FIRE & SECURITY EXPERTS

Koorsen Fire & Security boasts the most knowledgeable team in the life safety industry, training all technicians and sales associates in its nationally acclaimed corporate training center. This one-of-a-kind training facility incorporates both a classroom style approach coupled with hands-on training to better familiarize Koorsen associates with all of the systems and services it provides customers. With NICET certified instructors, the training center provides new and veteran associates with the expert training needed to offer customers unparalleled support and expert code knowledge. Koorsen sets the standard in training and has provided training to thousands of others in the life safety industry.



Koorsen Fire & Security Training Center



Classroom Training



Hands-on Training

KOORSEN CUSTOMER PROFILE

Koorsen Fire & Security has the knowledge, expertise and bandwidth to service any business – regardless of its size or industry focus. With \$10 million worth of product liability protection and bonding capabilities and a fleet of nearly 300 service trucks, Koorsen's qualifications far exceed the majority of other fire protection and security companies. Koorsen's current customer base contains more than 75,000 businesses and can be found in roughly 200,000 properties across the United States, serving everyone from mom-and-pop shops to Fortune 500 companies.

Koorsen®

FIRE & SECURITY

MONITORING CAPABILITIES



Koorsen Fire & Security uses three state-of-the-art, U.L. listed monitoring facilities with complete back-up systems capable of monitoring all of your life safety systems. With extensively trained associates, our monitoring centers provide 24-hour rapid response to emergencies.

WHY KOORSEN?

Our business is saving yours from the destruction of fire and intrusion in addition to offering customized solutions for effective communications. Keeping your people, your building, and your assets protected is a priority, while also ensuring that your business is compliant with state, industry and federal regulations.

We've been doing it since 1946, and we do it with the intensity, thoroughness, and dedication you'd expect from a company with a critical mission.



- We install and maintain the right fire and security protection for your facility, whether that's a restaurant or healthcare operation, a manufacturing plant or your own home.
- Our technicians are fully certified and receive ongoing training in our own training center at our national headquarters.
- We maintain a staff of NICET- certified design engineers and project managers who are masters of designing systems that meet code and bring you the most appropriate system for your operation and your budget.
- We give you one number to call when you need service. Whether you utilize just one of our services or a full range, you work with one Koorsen account manager who can answer all your questions and make sure your fire protection and security needs are met.
- We have a location near you, providing responsive customer service and a hometown business.
- We offer all the high-quality products you could want, configured and maintained for your needs by experienced associates.

Every point mentioned is important, but what really sets us apart is something more. It's our company culture of honesty and our devotion to doing the job right every time that most ensures our customers stay safe. It's the reason they choose Koorsen to provide total protection from one source and protect what they've worked so hard for.

FY18 REVENUE

Girls Inc

| ACCT | CATEGORY | # GIRLS | FEE | FY18 BUDGET |
|-------------|---------------------------------|---------|-----|------------------|
| 4000 | CONTRIBUTED SUPPORT | | | |
| 4010 | Individual/Corporate Gifts | | | |
| | NAP | | | 8,000.00 |
| | Spring Letter | | | 1,000.00 |
| | Fall letter | | | 500.00 |
| | General donations | | | 30,000.00 |
| | United Way designated | | | 9,724.00 |
| | Board giving | | | 6,000.00 |
| | Corporate Gifts | | | 18,000.00 |
| 4010 | TOTAL IND/BUSINESS GIFTS | | | 73,224.00 |
| 4050 | Sponsors:Programs | | | |
| | MLK | | | 500.00 |
| | Cinema Saturday | | | 100.00 |
| | Girls Night In | | | 750.00 |
| | EmpowHERment Conference | | | 1,000.00 |
| | Block Party | | | 1,450.00 |
| | Homecoming | | | 1,000.00 |
| | Day of the Girl | | | 250.00 |
| | Spooktacular | | | - |
| | Thanksgiving | | | 500.00 |
| | Giving Tuesday | | | 250.00 |
| | Work It Out Workshop | | | 750.00 |
| 4050 | TOTAL SPONSORS: PROGRAMS | | | 6,550.00 |
| 4210 | Grants-Corp/Business/Foundation | | | |
| | Anthem | | | - |
| | Best Buy | | | - |
| | Board of Realtors | | | 500.00 |
| | Boston Scientific | | | - |
| | CHAMPS | | | - |
| | Circle of Sisterhood | | | 2,500.00 |
| | Comcast | | | 9,000.00 |
| | Community Foundation | | | 10,000.00 |
| | Dollar General | | | - |
| | Endowment Income | | | 3,250.00 |
| | Geminus | | | - |
| | Girls Inc. | | | 5,000.00 |
| | IYI | | | - |
| | Lilly | | | 40,060.00 |
| | Maximus | | | - |
| | Miller | | | 10,000.00 |
| | Other Grants | | | 10,000.00 |
| | SCI REMC | | | 1,000.00 |
| | Smithville | | | - |
| | UDWI REMC | | | 500.00 |
| | United Way | | | 25,000.00 |

FY18 REVENUE

Girls Inc

| ACCT | CATEGORY | # GIRLS | FEE | FY18 BUDGET |
|-------------|-----------------------------------|---------|-----|-------------------|
| | Vectren | | | 5,000.00 |
| | Wylie | | | |
| 4210 | TOTAL GRANTS-CORP/BUSINESS | | | 121,810.00 |
| 4250 | Grants-Government | | | |
| | Sophia Travis | | | 3,000.00 |
| | Jack Hopkins | | | |
| | Townships | | | 1,000.00 |
| 4250 | TOTAL GRANTS-GOVERNMENT | | | 4,000.00 |
| 4000 | TOTAL CONTRIBUTED SUPPORT | | | 205,584.00 |

| 5200 EARNED REVENUE | | | | |
|----------------------------|-------------------------------------|--------|--------|-------------------|
| 5211 | MEMBERSHIP | | | |
| | members volleyball only | 90 | 55.00 | 4,950.00 |
| | members camp only | 60 | 55.00 | 3,300.00 |
| | after school | 50 | 55.00 | 2,750.00 |
| 5211 | TOTAL MEMBERSHIP | | | 11,000.00 |
| 5220 | SPORTS | | | |
| | Winter Vball League | 90 | 55.00 | 4,950.00 |
| | Summer Vball League | 60 | 55.00 | 3,300.00 |
| | Fall Vball League | 60 | 55.00 | 3,300.00 |
| | Winter/Spring Jump Start | 90 | 16.25 | 1,462.50 |
| | Summer Jump Start | 90 | 16.25 | 1,462.50 |
| | Fall Jump Start | 73 | 16.25 | 1,186.25 |
| | Clinics x 3 | 75 | 25.00 | 1,875.00 |
| 5220 | TOTAL SPORTS FEES | | | 17,536.25 |
| 5230 | CAMPS | | | |
| | Fall Camp (2 days) | 25 | 50.00 | 1,250.00 |
| | Thanksgiving Camp (2 days) | 25 | 50.00 | 1,250.00 |
| | Winter Camp (2 days) | 25 | 50.00 | 1,250.00 |
| | MLK Day | 20 | - | - |
| | Spring Break (5 days) | 30 | 125.00 | 3,750.00 |
| | Summer Camp (8 weeks) | 440 | 150.00 | 66,000.00 |
| | EmpowHERment Retreat | 20 | 75.00 | 1,500.00 |
| 5230 | TOTAL CAMPS | | | 75,000.00 |
| 5320 | FACILITY RENTAL | | | |
| 5820 | SPECIAL EVENTS REVENUE | | | |
| | Gala | 100.00 | 75.00 | - |
| | Flower Sale | | | 12,000.00 |
| | Luncheon | | | 10,000.00 |
| | Hoopla | | | 9,000.00 |
| 5820 | TOTAL SPECIAL EVENTS REVENUE | | | 31,000.00 |
| 5200 | TOTAL EARNED REVENUE | | | 134,536.25 |

| | |
|----------------------|-------------------|
| TOTAL REVENUE | 340,120.25 |
|----------------------|-------------------|

All Expenses

Girls Inc

| EXPENSES | FY18 |
|------------------------------------|-------------------|
| Wages | |
| Full time Wages | |
| Executive Director | 48,000.00 |
| Director of Oper & Dev | - |
| Sports & Community Development Dir | 30,986.80 |
| Program Director | 29,411.20 |
| Finance Manager | 32,536.14 |
| Part Time Wages | |
| Transportation & Facilities | 14,040.00 |
| Outreach | - |
| Programs | 11,025.00 |
| Sports | 8,250.00 |
| Finance | 8,250.00 |
| Summer Lead Counselor | 4,243.75 |
| Summer Teen Director | - |
| Summer Camp Counselor | 3,630.00 |
| Summer Camp Counselor | 3,630.00 |
| Summer Camp Counselor | 3,630.00 |
| School year camp | |
| Counselor | 1,056.00 |
| Bus Driver | 5,400.00 |
| Overtime Allowance | |
| TOTAL WAGES | 204,088.89 |
| Fringe | |
| Health Insurance | 15,034.00 |
| Retirement Fund | 2,818.68 |
| Full time - Payroll Taxes | 10,781.46 |
| Part time - Payroll Taxes | 4,831.34 |
| TOTAL FRINGE | 33,465.48 |
| Insurance--Not Health | |
| Directors & Officers | 3,014.00 |
| Member (Transportation) | 880.00 |
| Workers Comp | 1,857.00 |
| TOTAL INSURANCE NOT HEALTH | 5,751.00 |
| Office Expenses | |
| Conferences | - |
| Professional Development | - |
| Accounting Fees | 7,000.00 |

All Expenses

Girls Inc

| EXPENSES | FY18 |
|---|------------------|
| Cleaning Personnel | 4,680.00 |
| Misc. Office Supplies | 1,500.00 |
| Copier Maintenance Agreement | 1,800.00 |
| Technology | 3,608.00 |
| General Postage | 250.00 |
| Printing/Copying | - |
| Books/Subscriptions/References/Memberships | - |
| TOTAL OFFICE EXPENSES | 18,838.00 |
| Programs | |
| After School | 10,796.15 |
| Outreach | 1,500.00 |
| Camps | 10,522.85 |
| Events | 2,280.00 |
| Sports | 3,900.00 |
| TOTAL PROGRAMS | 28,999.00 |
| Fundraising/Special Events | |
| Postage/printing | - |
| Flower Sale | 7,250.00 |
| Giving Tuesday | - |
| Spring letter | - |
| Year end letter | - |
| Direct mail renewal and upgrading of donors | - |
| Thank you gifts (major donors) | - |
| Major gift acquisition | - |
| Planned gifts acquisition | - |
| Grants acquisition | - |
| Donor/awareness events | 100.00 |
| Corporate giving acquisition | - |
| Luncheon | 3,400.00 |
| Holiday Hoopla | 2,250.00 |
| Fundraising Gala | - |
| TOTAL FUNDRAISING SPECIAL EVENTS | 13,000.00 |
| Transportation | |
| Insurance | |
| Fuel/Oil | |
| Vehicle Registration | |

All Expenses

Girls Inc

| EXPENSES | FY18 |
|-------------------------------------|-------------------|
| Vehicle Repair | |
| CDL Licenses/Med exams | |
| Transportation Rental | |
| TOTAL TRANSPORTATION | - |
| Misc Business Expenses | |
| Advertising (moved to program fees) | |
| Bank/Merchant Fees | 4,800.00 |
| Line of Credit Interest Expense | 200.00 |
| Bad Debt | 400.00 |
| Misc. Expenses | |
| BNI | - |
| Chamber of Commerce Dues | - |
| Girls Inc. National Dues | 4,500.00 |
| State/Federal Filings | 29.00 |
| TOTAL MISC BUSINESS EXPENSE | 9,929.00 |
| Occupancy Expenses | |
| Electricity (center and gym) | 6,000.00 |
| Property Insurance | 6,224.00 |
| Gas (center and gym) | 2,500.00 |
| Maintenance Services/Supplies | 3,500.00 |
| Repairs (break from maintenance) | 2,000.00 |
| Security system fees | - |
| Telephone/Internet | 2,545.00 |
| Water & Sewer (center and gym) | 1,500.00 |
| Cleaning Supplies | - |
| Trash | 600.00 |
| TOTAL OCCUPANCY EXPENSE | 24,869.00 |
| TOTAL EXPENSES | 338,940.37 |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Hoosier Hills Food Bank

Address: Mailing: PO Box 697, Bloomington, IN 47402-0697

Phone: 812-334-8374

E-Mail: julio@hhfoodbank.org

Website: www.hhfoodbank.org

President of Board of Directors: Kevin R. Robling

Name of Executive Director: Julio Alonso

Phone: 812-334-8374

E-Mail: julio@hhfoodbank.org

Name and Title of Person to Present Proposal to the Committee: SAME

Phone:

E-Mail:

Name of Grant Writer: SAME

Phone:

E-Mail:

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 11 | 2 | 1,968 |

AGENCY 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.

HHFB collects donated and other food, stores and distributes it through direct service programs and to partner agencies serving people with low incomes, children, seniors and the ill in south central Indiana.

PROJECT INFORMATION

Project Name: Truck Replacement

Total cost of project: \$140,000.00

Requested amount of JHSSF funding: \$5,000.00

Total number of City residents anticipated to be served by this project in 2019: 10,062

Total number of clients anticipated to be served by this project in 2019: 25,800

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

We are requesting \$5,000 in challenge matching funds that will serve as the down payment on the purchase of a new, high payload refrigerated box truck with a lift-gate. The new vehicle will replace a 31-year old truck that will be retired.

This truck will have a variety of uses including pick up of large fresh produce loads from Gleaners Mixing Center in Indianapolis and from local farms that are gleaning partners. It will also collect food from retailers in Bloomington and make deliveries to Mother Hubbard's Cupboard; and will serve to back up our other high capacity box truck when it is unavailable and be used during large food drives like Hoosier Hysteria, Stamp Out Hunger and IU Health and special events including the community book fair.

We raised \$85,000 toward the \$140,000 cost of a new truck including a \$65,000 anonymous challenge payable if we raise the remaining \$55,000 before December 1. Since announcing the challenge on March 22 we've raised an additional \$8,300 and are seeking funders for the balance.

Address where project will be housed:

2333 West Industrial Park Drive, 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 to capital improvements to real estate and if you do not own the property at which the project 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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

While not a collaborative project in the sense of this application, this project will involve providing food to about 100 partner agencies and programs, including over 40 in the City of Bloomington.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending)*: Confirmed or Received: Soup Bowl Benefit - \$20,000; Anonymous Challenge Grant - \$65,000; Private Donations - \$8,300. Pending: Lawrence County Community Foundation - \$5,000; Owen County Community Foundation - \$2,500; Woodforest National Bank - \$5,000; Other: Monroe County government request \$5,000; Board fundraising commitment - \$10,000. Both private and institutional donors are being approached for the balance of \$24,200 and our board of directors has committed to raising a minimum of \$10,000 toward that balance. With a \$5000 Jack Hopkins grant, we would reach our target of \$140,000.

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds: With JH funding, we intend to meet our remaining challenge grant requirement of \$41,700 well in advance of our December 1 goal. At that time, we will formally place an order for the truck and provide a deposit for which we will seek JH reimbursement in order to conclude the claim process before the end of 2019.

If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received: \$28,300 is currently in hand, \$65,000 challenge funds will be released as soon as balance is committed. Only commitments are required to release our challenge funding. Remaining funds will come from a variety of sources but all funds are expected to be in hand prior to delivery and payment for truck in late summer 2020.

FISCAL LEVERAGING *(100 words or less)*

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

Our request is for a contribution of \$5,000 from the City of Bloomington toward the \$55,000 needed to meet a challenge grant that will provide \$65,000 in funding toward a total cost of \$140,000, so leveraging other funds is precisely the reason for our request. Once put in service, the vehicle itself will be used to collect donated food both locally and through the Gleaners Produce Mixing Center in Indianapolis and to distribute such food to partner agencies. Local collection will include retail/wholesale donor sources and produce gleaned from local farm donors. Currently, the lack of a reliable high capacity truck requires that we forgo opportunities to obtain certain donations. In 2018, HHFB leveraged food valued at over \$2.9 million for distribution in the City of Bloomington.

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|-----------------|---|------------------|
| Priority #1 | While a lower award will require additional fundraising elsewhere, any amount will count toward our challenge. | |
| Priority #2 | | |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$5000.00 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The last SCAN report stated that “having access to an adequate food supply continues to be a problem for some individuals and families (and) hunger can be associated with homelessness, poverty and unemployment,” while the Consolidated Plan emphasizes support for providing assistance to non-profits addressing basic needs such as food, shelter and health care through Jack Hopkins and CDBG funding. At least 20 of the agencies noted in the plan as contributing to these goals and being used by clients for support services are partner agencies of HHFB. Additionally, Monroe County has a food insecurity rate of 17.6% and child food insecurity rate of 18.6% meaning over 25,000 individuals including over 4,200 children are food insecure in our area (www.feedingamerica.org/mapthegap). We believe our work is grounded in two principles that are highly accepted among City of Bloomington residents – compassion, that dictates no one be allowed to go hungry in our community; and sustainability – which requires that food not be wasted but rather channeled to those who need it.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

Our request is for partial funding of the one-time purchase of a piece of equipment – a new, high payload, refrigerated box truck with lift-gate. While there are ongoing expenses involved in maintenance of a vehicle (insurance, registration, etc.), some of those costs will be covered through retirement of an existing vehicle and savings in repair and maintenance costs. While the current truck required over \$7300 in repairs this year simply to pass annual DOT inspection, the new truck will be under warranty.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

We anticipate that there will always be some level of need for the services provided by Hoosier Hills Food Bank. There will always be food in danger of being wasted and there will always be people who are in need of food assistance. We believe that maintaining a strong community food bank is essential to ensuring that however food insecurity levels may fluctuate, hunger will never be an issue for people in our community. There should always be a strong mechanism in place to ensure that it isn't. The vehicle we are purchasing should serve our organization for at least 15 years or more. We intend to remain a strong voice and a strong actor in ensuring that people do not go hungry and that they have the nutrition necessary to learn, work, play, grow and be healthy citizens.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

Ultimately, we hope our work will result in lower food insecurity rates and there has been some very small progress in this direction, but we would be reluctant to tie this specific grant request to such a measure. We do believe, however, that acquisition of this new vehicle will enable HHFB to improve both our capacity and efficiency with increases in the levels of fresh produce we obtain and distribute and reductions in vehicle repair costs and staff time associated with the effects of unreliable or unavailable vehicles.

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.

JHSS Funding has been very generous to HHFB in the past, including a grant last year that enabled the purchase of a new van. Normally, we might not have sought support this year. However, because we have an opportunity to leverage a substantial challenge grant and because we very much want the City of Bloomington to be part of this significant project that will result in a very visible and practical symbol of our work, we're seeking funding that amounts to less than 4% of the total project cost.

Like our overall efforts, this truck purchase will represent the support of several of the many jurisdictions we serve, small individual donors, a special contribution from a cherished community event, business and private sector contributions all coming together to leverage even more support by meeting a challenge opportunity. This truck will serve our community for well over a decade and we want it to represent the support from so many segments of the community that is the hallmark of our ability to keep doing what we do.

We assure you that we WILL meet this challenge. It's simply too good and too vital not to. JH funds will be well-applied and although we will not see an immediate effect this year, we will achieve a significant improvement in our capacity by next summer when the truck arrives. The down side of waiting about 9 months or so for a truck to be built and delivered is outweighed by the knowledge that it will be the truck built to our needs and carrying a warranty.

One of the ways we convinced our challenge donor to provide their support was by noting that while we had many generous supporters, few would be willing to "go first" and take the risk that we could raise the rest of the funds needed on such a large expense. We now have more than two-thirds of the funds confirmed with strong leads and momentum for the balance, so we respectfully ask you to take that much smaller risk now with our assurance that we will get there. We appreciate your consideration.

| HHFB "Jumbo" Truck Replacement Project 2019 | | | | | | |
|--|----------------------|--|--|-------------------|--|--|
| New Truck Expenses | | | | | | |
| Based on current quote for 2019 International 4300 Durastar 26' box truck with Thermo-King refrigeration unit and Waltco Lift-gate | | | | | | |
| Chassis, Box & Lift-gate | \$ 109,125.00 | | | | | |
| Refrigeration & Insulation | \$ 21,935.00 | | | | | |
| Extended Warranties | \$ 4,037.00 | | | | | |
| Graphics | \$ 4,000.00 | | | | | |
| Contingency | \$ 903.00 | | | | | |
| Total Cost | \$ 140,000.00 | | | | | |
| Revenue | | | | | | |
| Soup Bowl Donations | \$ 20,000.00 | | | | | |
| Challenge Grant | \$ 65,000.00 | | | | | |
| Current Private Donations | \$ 8,300.00 | | | | | |
| Lawrence County CF | \$ 5,000.00 | | | Requested/Pending | | |
| Owen County CF | \$ 2,500.00 | | | Requested/Pending | | |
| Board Committed Fundraising | \$ 10,000.00 | | | | | |
| Woodforest National Bank | \$ 5,000.00 | | | Requested/Pending | | |
| Monroe County government | \$ 5,000.00 | | | To be requested | | |
| Jack Hopkins Grant | \$ 5,000.00 | | | Requested/Pending | | |
| Other fundraising | \$ 14,200.00 | | | | | |
| Total Revenue | \$ 140,000.00 | | | | | |
| *All truck construction including refrigeration and lift-gate will be paid through one vendor, which is where deposit will be paid. Graphics will be installed separately by a local vendor. | | | | | | |

DEC 18



ACCOUNTANTS' COMPILATION REPORT

To the Board of Directors
Hoosier Hills Food Bank, Inc.
Bloomington, Indiana

Management is responsible for the accompanying financial statements of Hoosier Hills Food Bank, Inc. (a non-profit corporation), which comprise the statement of financial position as of December 31, 2018 and 2017, and the related statements of activities for the one and twelve months then ended, and the accompanying supplementary information in accordance with accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the financial statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any form of assurance on these financial statements and supplementary information. During our compilation, we did become aware of certain departures from accounting principles generally accepted in the United States of America that are described in the following paragraph.

The value of in-kind donations of food and supplies and the value of such materials distributed have not been included in these financial statements. This data has been omitted because the amounts have not been determined. If accounting principles generally accepted in the United States of America had been followed, in-kind revenue and expenses would be different by an undetermined amount. The net of donations received and distributions has been estimated and included as an expense. A statement of cash flows and a statement of functional expenses for the period ended has not been presented. Accounting principles generally accepted in the United States of America require that such statements be presented when financial statements purport to present financial position and results of operations.

Management has elected to omit substantially all of the disclosures required by accounting principles generally accepted in the United States of America. If the omitted disclosures and statements were included in the financial statements, they might influence the user's conclusions about the company's financial position, changes in net assets, and cash flows. Accordingly, the financial statements are not designed for those who are not informed about such matters.

Stampfli Associates

February 21, 2019

Hoosier Hills Food Bank, Inc.
Statements of Financial Position
December 31, 2018 and 2017

Hoosier Hills Food Bank

Assets

| | 2018 | 2017 |
|-------------------------------------|------------------------|------------------------|
| Current Assets | | |
| Petty Cash | \$ 50.00 | \$ 50.00 |
| German American Checking | 123,182.67 | 96,567.90 |
| German American Savings | 56,456.91 | 41,196.34 |
| CD - 18 month | 48,529.57 | 48,263.32 |
| Unrestricted CD | 18,791.63 | 18,693.29 |
| Accounts Receivable | 15,106.79 | 21,402.83 |
| Contribution Receivable | 3,014.57 | 3,014.57 |
| Grant Receivable - Unrestricted | 9,086.29 | 9,099.64 |
| Allowance for Uncollectible Account | (2,000.00) | (2,000.00) |
| Inventory - Donated Food Inventory | 196,331.52 | 275,828.28 |
| Inventory - Donated Book Inventory | 61,403.14 | 48,407.90 |
| Prepaid Insurance | 3,601.85 | 3,601.85 |
| Prepaid Warranty | 2,782.00 | 0.00 |
| Security Deposit | 1,960.00 | 1,960.00 |
| Total Current Assets | 538,296.94 | 566,085.92 |
| Property and Equipment | | |
| Land | 75,000.00 | 75,000.00 |
| Buildings | 843,086.00 | 513,086.00 |
| Building Improvements | 351,340.72 | 351,340.72 |
| Equipment | 151,445.66 | 151,445.66 |
| Vehicles | 439,424.58 | 383,060.80 |
| | 1,860,296.96 | 1,473,933.18 |
| Less Accumulated Depreciation | (896,076.24) | (833,664.01) |
| Net Property and Equipment | 964,220.72 | 640,269.17 |
| Total Assets | \$ 1,502,517.66 | \$ 1,206,355.09 |

Liabilities and Net Assets

| | 2018 | 2017 |
|---|------------------------|------------------------|
| Current Liabilities | | |
| Accounts Payable | 20,448.00 | 9,821.67 |
| Accrued Wages | 20,757.12 | 18,080.36 |
| Accrued Paid Time Off | 36,942.75 | 32,481.68 |
| Payroll Taxes Payable | 1,574.77 | 1,564.05 |
| Employee Benefits | 284.67 | 718.23 |
| Mortgage - Current | 10,458.35 | 15,079.39 |
| Total Current Liabilities | 90,465.66 | 77,745.38 |
| Long-Term Liabilities | | |
| Mortgage | 625,541.65 | 303,584.81 |
| Total Long-Term Liabilities | 625,541.65 | 303,584.81 |
| Total Liabilities | 716,007.31 | 381,330.19 |
| Net Assets - Unrestricted | 786,510.35 | 825,024.90 |
| Total Liabilities and Net Assets | \$ 1,502,517.66 | \$ 1,206,355.09 |

See Accountants' Compilation Report

13

Hoosier Hills Food Bank, Inc.

Hoosier Hills Food Bank

Statements of Activity

For the One and Twelve Months Ending December 31, 2018 and 2017

| | Period | | | Year | | |
|---|-----------------------|---------------------|------------------|----------------------|----------------------|---------------------|
| | 2018 | 2017 | Budget | 2018 | 2017 | Budget |
| Support and Revenue: | | | | | | |
| Support | | | | | | |
| Donated Book Inventory | \$ 12,995.24 | \$ 58,369.43 | \$ 0.00 | \$ 12,995.24 | \$ 58,369.43 | \$ 0.00 |
| United Way | 2,162.45 | 4,248.78 | 3,416.67 | 29,158.02 | 42,998.07 | 41,000.00 |
| Misc Grants | 2,000.00 | 1,000.00 | 6,250.00 | 55,954.53 | 72,365.76 | 75,000.00 |
| Donations | 59,789.33 | 73,601.80 | 10,458.34 | 245,169.13 | 189,684.27 | 125,500.00 |
| Food Donation In Kind Income | 5,686,711.80 | 5,618,573.10 | 0.00 | 5,686,711.80 | 5,618,573.10 | 0.00 |
| Bequest | 0.00 | 0.00 | 8.34 | 17,970.31 | 21.67 | 100.00 |
| Total Support | <u>5,763,658.82</u> | <u>5,755,793.11</u> | <u>20,133.35</u> | <u>6,047,959.03</u> | <u>5,982,012.30</u> | <u>241,600.00</u> |
| Revenue | | | | | | |
| Shared Maint | 11,899.10 | 14,887.34 | 16,833.34 | 181,997.93 | 200,969.21 | 202,000.00 |
| Food Purchase Reimbursement | 0.00 | 0.00 | 8.34 | 0.00 | 0.00 | 100.00 |
| Monroe Co FEMA | 0.00 | 0.00 | 958.34 | 5,003.50 | 17,250.00 | 11,500.00 |
| CDB Grant-Operating | 0.00 | 0.00 | 2,083.34 | 22,849.00 | 24,999.00 | 25,000.00 |
| USDA | 18,159.23 | 9,684.40 | 9,099.67 | 130,357.95 | 110,950.28 | 109,196.00 |
| Local Government Grants | 5,000.00 | 6,970.00 | 4,166.67 | 59,340.00 | 38,700.00 | 50,000.00 |
| Interest Income | 58.11 | 26.15 | 20.84 | 432.85 | 306.41 | 250.00 |
| Fund-Raising Events | 75,884.28 | 70,759.45 | 31,250.03 | 415,496.11 | 390,458.33 | 375,000.00 |
| Total Revenue | <u>111,000.72</u> | <u>102,327.34</u> | <u>64,420.57</u> | <u>815,477.34</u> | <u>783,633.23</u> | <u>773,046.00</u> |
| Total Revenue, Gains and Other Support | <u>5,874,659.54</u> | <u>5,858,120.45</u> | <u>84,553.92</u> | <u>6,863,436.37</u> | <u>6,765,645.53</u> | <u>1,014,646.00</u> |
| Expenses | | | | | | |
| In Kind Food Expense | 5,766,208.56 | 5,518,906.93 | 0.00 | 5,766,208.56 | 5,518,906.93 | 0.00 |
| Salaries | 48,166.54 | 46,315.34 | 41,410.00 | 509,867.27 | 487,459.21 | 496,920.00 |
| Payroll Taxes | 3,521.46 | 3,456.62 | 3,167.83 | 38,483.66 | 37,122.92 | 38,014.00 |
| Health Insurance | 7,631.36 | 6,867.54 | 6,987.50 | 80,912.78 | 79,451.13 | 83,850.00 |
| Employee Benefits | 695.29 | 779.74 | 750.00 | 8,986.45 | 8,414.36 | 9,000.00 |
| IU Work Study | 0.00 | 0.00 | 150.00 | 68.29 | 1,858.58 | 1,800.00 |
| Harvest Membership | 26.66 | 16.05 | 666.66 | 8,452.94 | 8,167.30 | 8,000.00 |
| Food Share Purchase | 5,159.17 | 23,947.42 | 8,333.33 | 86,407.93 | 88,357.74 | 100,000.00 |
| Agency Food Purchase | 0.00 | 0.00 | 8.33 | 0.00 | 0.00 | 100.00 |
| Supplies & Maintenance | 593.22 | 1,363.02 | 291.66 | 2,307.52 | 3,870.03 | 3,500.00 |
| Occupancy | 3,351.85 | 3,408.27 | 2,233.31 | 29,045.81 | 27,710.53 | 26,800.00 |
| Office Supplies | 508.72 | 295.96 | 208.33 | 1,950.44 | 2,368.86 | 2,500.00 |
| General Office Fund | 140.18 | 0.00 | 83.33 | 2,333.72 | 853.20 | 1,000.00 |
| Computer Sup. & Exp. | 584.75 | 576.35 | 500.00 | 5,454.85 | 6,429.01 | 6,000.00 |
| Telephone | 166.59 | 158.73 | 191.66 | 2,261.13 | 2,174.61 | 2,300.00 |
| Postage | 548.96 | 636.74 | 416.66 | 3,091.28 | 6,188.53 | 5,000.00 |
| Subscriptions & Publications | 200.32 | 86.00 | 41.66 | 636.94 | 483.70 | 500.00 |
| Conf & Lodging | 0.00 | 0.00 | 300.00 | 2,872.79 | 3,351.99 | 3,600.00 |
| Business Insurance | 2,068.17 | 7,608.47 | 2,333.33 | 33,995.56 | 31,912.90 | 28,000.00 |
| Copy & Printing | 2,105.20 | 843.55 | 1,041.66 | 8,570.16 | 13,560.72 | 12,500.00 |
| Fundraising exp | 19,670.00 | 19,863.42 | 5,666.66 | 93,382.19 | 85,724.18 | 68,000.00 |
| Vehicle Expenses | 16,204.08 | 4,266.24 | 3,683.32 | 73,212.01 | 76,021.39 | 44,200.00 |
| Interest Expense | (875.56) | 954.36 | 937.50 | 12,395.59 | 11,720.92 | 11,250.00 |
| Donated Book Expense | 0.00 | 57,281.13 | 0.00 | 0.00 | 57,281.13 | 0.00 |
| Compliance and Safety Expense | 2,197.58 | 706.22 | 291.66 | 5,104.86 | 5,537.45 | 3,500.00 |
| Equip Repair & Maintenance | 0.00 | 0.00 | 187.50 | 3,859.98 | 2,413.27 | 2,250.00 |
| Repairs & Maintenance | 175.00 | (1,789.50) | 375.00 | 4,230.21 | 8,107.15 | 4,500.00 |
| Legal & Accounting | 1,975.00 | 1,870.00 | 1,916.66 | 24,320.00 | 23,035.00 | 23,000.00 |
| Volunteer Supplies | 711.20 | 119.53 | 458.33 | 5,947.12 | 5,803.15 | 5,500.00 |
| Employee Mileage | 0.00 | 68.58 | 125.00 | 1,866.20 | 1,625.71 | 1,500.00 |
| Depreciation | 62,412.23 | 63,074.33 | 0.00 | 62,412.23 | 63,074.33 | 0.00 |
| Miscellaneous | 41.25 | 59.00 | 130.16 | 3,484.33 | 2,417.18 | 1,562.00 |
| Food Rescue Supplies | 4,312.06 | 4,913.55 | 1,666.66 | 19,503.27 | 25,159.53 | 20,000.00 |
| Total Expenses | <u>5,948,499.84</u> | <u>5,766,653.59</u> | <u>84,553.70</u> | <u>6,901,626.07</u> | <u>6,696,562.64</u> | <u>1,014,646.00</u> |
| Changes in Unrestricted Net Assets | <u>\$ (73,840.30)</u> | <u>\$ 91,466.86</u> | <u>\$ 0.22</u> | <u>(38,189.70)</u> | <u>69,082.89</u> | <u>0.00</u> |
| Net Assets - January 1st | | | | 824,700.05 | 755,942.01 | 0.00 |
| Net Assets - December 31, 2018 | | | | <u>\$ 786,510.35</u> | <u>\$ 825,024.90</u> | <u>\$ 0.00</u> |



Indianapolis IN
1326 W. Thompson Road
Indianapolis, IN 46217
800-783-6869

Hoosier Hills Food Bank
Customer Proposal Letter

2019

*Liftgate
Unesses style
No Thermoking*

Hoosier Hills Food Bank Inc
615 N. Fairview
Bloomington, IN 47404
(812) 334-8377

Dan Taylor, thank you for the opportunity to earn your business. We look forward to working with you on your business needs. Please accept the following proposal.

VEHICLE

Make International Model _____ Year _____ Stock Number To Be Determined
Additional Vehicle and Accessories Description _____ To be delivered on or about 9/25/2019

| Quantity | 1 | Total |
|---|--------------|--------------|
| Truck Price per Unit | \$108,960.61 | \$108,960.61 |
| F.E.T. (Factory & Dealer Paid) | \$0.00 | \$0.00 |
| Net Sales Price | \$108,960.61 | \$108,960.61 |
| Optional Extended Warranty(ies) | | |
| State Sales Tax | | |
| Documentary Fee | \$164.00 | \$164.00 |
| Administration Fee | | |
| Vehicle Inventory Tax | | |
| Additional Taxes | | |
| Tire Recycling Program | | |
| Battery Disposal Fee | | |
| Out of State Vehicle Fee | | |
| Rebate(s) | | |
| Total Sales Price (Including Rebate(s)) | \$109,124.61 | \$109,124.61 |
| Trade Allowance (see DISCLAIMER Below) | | \$0.00 |

*Orig. 35,872
New 36,203

331*

Sales Representative _____ Thomas Ritter
Purchaser _____ signature _____ printed name _____
signature _____ printed name _____
Accepted by Sales Manager or _____ title _____ date _____
General Manager _____ signature _____ printed name _____

Quote good until **10/30/2019** Note: The above Customer Proposal is a quotation only. Sale terms subject to approval of Sales Manager of Dealer.

DISCLAIMER: Any order based on this Proposal subject to Customer executing Dealer's standard form Retail Purchase Order incorporating above terms. Any documentary fees, state tax, title, registration and license fees subject to adjustment and change. Actual F.E.T. to be paid by Dealer, subject to adjustment. Any F.E.T. variance will be responsibility of Dealer. Manufacturer has reserved the right to change the price to Dealer of any vehicle not currently in Dealer's stock, without notice to Dealer. If Quoted Vehicle(s) not currently in Dealer's stock, Dealer reserves right to change Quotation Total to reflect any price increases from Manufacturer. This Proposal is based upon Dealer's current and expected inventory, which is subject to change. Dealer not obligated to retain any specific vehicles in stock, nor maintain any specific inventory level. Dealer shall not be obligated to fulfill Proposal in event quoted vehicle(s) not in stock or available within requested delivery schedule at time Proposal accepted. Dealer shall not be liable for any delay in providing or inability to provide Quoted Vehicle(s), where such inability or delay is due, in whole or in part, to any cause beyond the reasonable control of Dealer or is without the gross negligence or intended misconduct of Dealer. Above listed Trade Value based upon current appraisal of Trade Vehicle(s). Dealer may adjust Trade Value of Trade Vehicle(s) to reflect changes in condition and/or mileage of Trade Vehicle(s) between date of current appraisal and acceptance of this Proposal by Customer.



THERMO KING MIDWEST

www.THERMO KING MIDWEST.com

| | | |
|-------------------------|--------------------------|----------------|
| 817 S. Tibbs Ave. | Indianapolis, IN 46242 | (317) 247-4002 |
| 3405 Industrial Parkway | Jeffersonville, IN 47130 | (812) 282-5022 |
| 2275 Patrick Henry Way | New Haven, IN 46774 | (260) 493-0046 |
| 7924 Burch Park Road | Evansville, IN 47711 | (812) 867-0141 |
| 2926 Lillian Street | Elkhart, IN 46514 | (574) 264-1221 |
| 3835 Rockland Drive | Millbury, OH 43447 | (419) 837-2108 |
| 1030 County Line Road | Sikeston, MO 63801 | (573) 472-2833 |
| 801 West Fifth Street | Delphos, OH 45833 | (419) 695-6060 |

26 January, 2018

Tom Ritter
 Rush Truck Center
 1325 West Thompson Road
 Indianapolis, IN 46217
 Reference: Hoosier Hills
 Quote #: ABKA-L2RT16

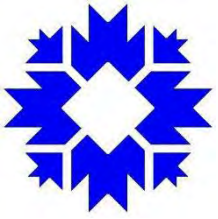
Good Morning Tom,

Thank you for considering the Thermo King T-1080S 50 high capacity diesel power transport temperature control system with Electric Standby. Following is information, specifications, and quotation for the unit you are projecting. T-1080S 50 with the following features and options:

- DAS Sensor Kit (10' Harness)
- DAS data logger- records temperature
- Door Switch- allows evaporator fans to turn off when door is open
- Kit Battery Box- to separate truck electrical system from Thermo King electrical system
- Battery-ReliaMax
- Electric Plug-50 amp 250 volt
- Miscellaneous materials as required

Price: \$21,934.51* per unit





**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: LIFEDesigns, Inc.

Address: 200 E. Winslow Rd.

Phone: (812) 332-9615

E-Mail: info@lifedesignsinc.org

Website: lifedesignsinc.org

President of Board of Directors: Mr. Tim Hightower

Name of Executive Director: Mr. Russell Bonanno

Phone: (812) 332-9615

E-Mail: rbonanno@lifedesignsinc.org

Name and Title of Person to Present Proposal

to the Committee: Ms. Stephanie Shelton, Director of Development and/or Russell Bonanno

Phone: (812) 369-8460

E-Mail: sshelton@lifedesignsinc.org

Name of Grant Writer: Bradley Davis

Phone: (812) 332-9615

E-Mail: braddavis@lifedesignsinc.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 161 | 61 | 100 |

AGENCY 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.

Our Mission: To partner with people of all ages and abilities to lead meaningful and active lives.

We promote independence for people with disabilities. Our core mission is providing staff supports to people with intellectual and developmental disabilities focusing on achieving independence through housing, employment, and establishing a network of supports around them. Our core programs support people to build life skills, employment skills, and develop relationships with other community members.

PROJECT INFORMATION

Project Name: Maintenance Vehicle to Support Group Homes and Low Income Housing

Total cost of project: \$49,233.00

Requested amount of JHSSF funding: \$20,000

Total number of City residents anticipated to be served by this project in 2019: 46

Total number of clients anticipated to be served by this project in 2019: 61 Directly; **60** employees, about **150** clients Indirectly

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

We are requesting **\$20,000** for the one-time, capital purchase of a new or used maintenance truck and snow plow in order to reduce our current expenses, ensure our parking lot is safe in the winter for staff and clients, and to provide more efficient service to our residents who live in group homes and low income housing owned by LIFEDesigns.

LIFEDesigns owns low income and permanent supportive housing. This allows us to offer our clients integrated accessible and affordable housing, which is a great need in Monroe County. Because of the University and a great demand for student housing, market rate housing is priced far out of budget for someone with a disability whose ability to work may be limited. Our focus on supporting people to achieve independence relies heavily on being able to find housing that is accessible to their needs inside the home and provides access to community resources like public transportation. Since becoming a low-income housing developer, we now own a 10 locations or facilities in Monroe & Owen counties which we're responsible for maintaining. We have 2 maintenance employees (1 full time and 1 part time) to maintain these properties. Our current maintenance vehicle is an old van that we retired from transporting clients. It's in great need of replacement and repairs to keep it going are more than its value. Additionally, our maintenance staff will be able to work much more effectively.

Address where project will be housed: LIFEDesigns Main Office: 200 E. Winslow Rd., 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 to capital improvements to real estate and if you do not own the property at which the project 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 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.

N/A

Note: Funds will not be disbursed until all requisite variances or approvals are obtained.

Is this a collaborative project? Yes No.

PROJECT COSTS

Is this request for operational funds? Yes No

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

Smithville Charitable Foundation - \$10,000 – Pending

Owen County Community Foundation - \$2,500 - Pending

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

Upon receiving funding awards, LIFEDesigns is prepared to move forward with purchasing steps with Community Ford Lincoln of Bloomington. Since we've already received a quote for the vehicle that we want, we would simply review and confirm the information and start the purchase process. The process of ordering a vehicle could take up to a couple of months before the vehicle is received. The claims for reimbursement could be submitted to JHSSF as soon as invoices have been received and payment has been made from LIFEDesigns. While we don't have a specific deadline that we have to meet for the project, we are excited to move forward with it, and will be moving the process along as quickly as we can. We expect all claims should be submitted by August 2019 timeframe.

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

We expect to receive a notice of award from the Smithville Charitable Foundation and Owen County Community Foundation this spring or early summer, about the same timeline that Jack Hopkins funding is on.

FISCAL LEVERAGING (100 words or less)

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

The numbers we're using are based on a new F-250 4-wheel drive, extended cab, long bed, with snow plow and tow package. Ford is offering an in-kind discount of \$11,528. Additionally, we are submitting a grant request to the Smithville Charitable Foundation, for \$10,000 and to Owen County Community Foundation for \$2500. Upon receiving notification of grant awards, we plan to approach some of our donors to contribute to the project as well. We feel confident we would be able to gain support from our donors if we are successful in receiving grant awards from SCF and JHSSF.

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|------------------------------------|--------------------|
| Priority #1 | Ford F-250 | \$17,000 |
| Priority #2 | Snow Plow Package | \$2,500 |
| Priority #3 | Locking, Single-Lid Toolbox | \$500 |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$20,000.00 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The Monroe County United Way's SCAN conducted in 2012, although dated, identifies priority areas still exceptionally relevant to the current needs of the Bloomington community. Our request for funding directly serves those citizens in affordable housing units who rely upon low income subsidies and accessible options. In addition, our proposal increases the ability of our organization to serve vulnerable populations, chiefly those with disabilities.

The City of Bloomington's Housing and Neighborhood Development Consolidated Plan corroborates and reinforces the needs identified in the SCAN. The burden of housing costs means many residents of Bloomington depend upon supported living/affordable arrangements like Crawford and Options. Challenges abound when an individual or family must contend with accessibility and inclusion due to disabilities. The Special Needs Assessment of the 2015 – 2019 Consolidated Plan outlines the utmost need in our community for services, housing, and inclusion for people relegated in the past to the fringes of society. Our proposal for new maintenance equipment provides another layer of stable and professional services to the existing operations of LIFEDesigns and increases our capacity to serve those in the community most in need.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

This is a request for a one-time capital purchase. We already budget for repairs and maintenance on our current maintenance vehicle, which is very old and needs much greater repairs than a new(er) vehicle would. We expect the new vehicle would decrease our operating budget through needing fewer repairs and removing the expense of contracting out snow removal on all 10 of our properties. With proper maintenance we expect this truck to last for at least 8-10 years or more.

LONG-TERM BENEFITS (200 words or less)

In the long-term, LIFEDesigns and our clients will recoup numerous benefits from the investment in a maintenance truck, snow plow, and toolbox. We will reduce expenditures on yearly snow and ice removal by nearly \$12,000 every three years—earning a net savings well within the lifetime of the new equipment. Furthermore, the maintenance staff will experience an increased capacity for serving the needs of our low-income housing residents and clients, especially compared to the current inefficiencies of an outdated van. Crucially, many more clients, staff, and visitors of LIFEDesigns' facilities in times of inclement weather benefit directly from a safer environment. As a significant portion of those we serve have physical disabilities or mobility concerns, internal ability to address the weather allows for the services and supports we provide 24/7 to continue no matter what. Ability to address maintenance and upkeep challenges more effectively in the next 10 years offers our supported group living and low-income housing clients a more stable environment in which to grow and succeed.

Explain how your program will have broad and long-lasting benefits for our community.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

We expect to reduce our expenses by eliminating our need to contract for snow removal on all our properties in Monroe and Owen counties. Over the past 3 years we've expended \$11,547 for snow removal. We would measure the effectiveness by looking at our expenses through next winter.

Our maintenance staff will be more effective with the right tools. We'll measure his effectiveness by surveying or interviewing clients and staff, and reporting on new activities and increased efficiencies. Our maintenance staff will be a resource for evaluating efficiencies. Our Director of Facilities will oversee the budget and surveys or interviews.

OTHER COMMENTS *(500 words or less)*

Community Ford Lincoln of Bloomington is committed to offering an in-kind gift of a discount on any vehicle we purchase from them. We are specifically looking at Ford because of the reliability of the brand, and their ability to offer us state minimum pricing through a government bid discount program. The estimated discount on the F-250 that we're using for the budget for this grant request would be \$11,528. With this discount, the benefit of having the warranty on a new vehicle, and the high value that many used trucks still carry, it's likely that buying a new vehicle will make the most economic sense. We are open to evaluating all possible options to acquire a vehicle that meets our needs and helps us to better accomplish our goals and fulfill our mission.

There are more people who live in city limits that would be impacted by this grant than those that live in housing we own. Sixty-one people living in our housing (61) will directly benefit from this grant (receive maintenance services), indirectly many more people will benefit through our programs (reduced expenses will put more funding into our core programs allowing us to serve more people). About 60 of our employees regularly use LIFEDesigns main office which is in city limits, and around 50-75 of our clients who live in city limits but do not live in housing we own also regularly visit our office and would be impacted by this grant. With the ability to keep our own home office parking lot cleared better, it would be safer for everyone.

On a regular basis, our maintenance staff has to use his own personal vehicle or the vehicle of a volunteer to transport large items or supplies. This can result in loss of productive work time. We want to provide our maintenance staff with a vehicle that is capable of towing a trailer, and that has a locking toolbox to securely store and transport tools and supplies. Our main strategy in implementing this project is to reduce vehicle repair expenses and snow plow removal expenses and improve quality of service to our residents, clients and employees. According to past surveys our residents are already pleased with our maintenance service, but snow removal has had some complaints in the past. If we're able to remove the snow ourselves, this would not only reduce expenses, but also improve safety of our employees and clients on our properties.

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.

Maintenance Vehicle to Support Group Hor

| Item | Total Cost | Ford In-Kind | JHSSF Request |
|-----------------------------|---------------------|---------------------|---------------------|
| Ford F-250 | \$ 43,010.00 | \$ 11,528.00 | \$ 17,000.00 |
| Snow Plow Package | \$ 5,528.00 | \$ - | \$ 2,500.00 |
| Locking, Single-Lid Toolbox | \$ 695.00 | \$ - | \$ 500.00 |
| Total | \$ 49,233.00 | \$ 11,528.00 | \$ 20,000.00 |

nes and Low Income Housing

| SCF Request | OCCF Request | LIFEDesigns | Total Funds |
|---------------------|---------------------|--------------------|---------------------|
| \$ 7,500.00 | \$ 2,500.00 | \$ 4,482.00 | \$ 43,010.00 |
| \$ 2,500.00 | \$ - | \$ 528.00 | \$ 5,528.00 |
| \$ - | \$ - | \$ 195.00 | \$ 695.00 |
| \$ 10,000.00 | \$ 2,500.00 | \$ 5,205.00 | \$ 49,233.00 |



Community Ford of Bloomington
2200 S Walnut St, Bloomington, Indiana, 474016520
Office: 812-331-2200
Fax: 812-331-3377

Customer Proposal

Prepared for:

STEPHANIE SHELTON

Prepared by:

Sam Roberts
Office: 812-331-2200
Email: policecarsam@gmail.com

Date: 03/22/2019

Vehicle: 2019 F-250 XL
4x4 SD Super Cab 8' box 164" WB SRW

Quote ID: LIFEDES GNS





STEPHANIE DHELTON

Re: Vehicle Proposal

Dear STEPHANIE,

Thank you very much for your interest in acquiring a vehicle from our dealership. We concur that your interest is well deserved. We hope that an outstanding product lineup and our dedication to customer service will enhance your ownership experience should you decide to buy a vehicle from us.

Attached, please find additional information that I hope will assist you in making a more informed decision. Please feel free to contact me at any time as I would truly appreciate the opportunity to be of service to you.

Sincerely,

Sam Roberts
Government Sales Manager
812-331-2200
policecarsam@gmail.com



Community Ford of Bloomington
2200 S Walnut St, Bloomington, Indiana,
474016520
Office: 812-331-2200
Fax: 812-331-3377

LIFEDesigns

2019 F-250, SD Super Cab
4x4 SD Super Cab 8' box 164" WB SRW
XL(X2B)
Price Level: 950 Quote ID: LIFEDESIGN

Table of Contents

| Description | Page |
|--------------------------------|------|
| Cover Page | 1 |
| Cover Letter | 2 |
| Table of Contents | 3 |
| Selected Options | 4 |
| Window Sticker | 7 |
| Pricing - Single Vehicle | 9 |
| Available Options | 10 |
| Warranty - Standard | 24 |



Selected Options

| Code | Description | MSRP |
|------------------------------|--|-------------|
| Base Vehicle | | |
| X2B | Base Vehicle Price (X2B) | \$38,490.00 |
| Packages | | |
| 600A | Order Code 600A <i>Includes:</i> - Engine: 6.2L 2-Valve SOHC EFI NA V8 Flex-Fuel <i>Flex-Fuel badge on fleet orders only.</i> - Transmission: TorqShift-G 6-Spd Auto w/SelectShift - GVWR: 10,000 lb Payload Package - Wheels: 17" Argent Painted Steel <i>Includes painted hub covers/center ornaments.</i> - HD Vinyl 40/20/40 Split Bench Seat <i>Includes center armrest, cupholder, storage and driver's side manual lumbar.</i> | N/C |
| Powertrain | | |
| 996 | Engine: 6.2L 2-Valve SOHC EFI NA V8 Flex-Fuel <i>Flex-Fuel badge on fleet orders only.</i> | Included |
| 44S | Transmission: TorqShift-G 6-Spd Auto w/SelectShift | Included |
| X3E | Electronic-Locking w/3.73 Axle Ratio | \$390.00 |
| STDGV | GVWR: 10,000 lb Payload Package | Included |
| Wheels & Tires | | |
| TBM | Tires: LT245/75Rx17E BSW A/T | \$165.00 |
| 64A | Wheels: 17" Argent Painted Steel <i>Includes painted hub covers/center ornaments.</i> | Included |
| Seats & Seat Trim | | |
| A | HD Vinyl 40/20/40 Split Bench Seat <i>Includes center armrest, cupholder, storage and driver's side manual lumbar.</i> | Included |
| Other Options | | |
| 164WB | 164" Wheelbase | STD |
| 96V | XL Value Package | \$1,000.00 |

Prices and content availability as shown are subject to change and should be treated as estimates only. Actual base vehicle, package and option pricing may vary from this estimate because of special local pricing, availability or pricing adjustments not reflected in the dealer's computer system. See salesperson for the most current information.



Selected Options (cont'd)

| Code | Description | MSRP |
|------------------------|---|-----------------|
| | <i>Includes:</i> - 4.2" Center-Stack Screen - Radio: AM/FM Stereo/MP3 Player <i>Includes 6 speakers.</i> - SYNC Communications & Entertainment System <i>Includes enhanced voice recognition with 911 Assist, 4.2" LCD center stack screen, AppLink, 1 smart-charging USB port and steering wheel audio controls.</i> - Bright Chrome Hub Covers & Center Ornaments - Chrome Front Bumper - Chrome Rear Step Bumper - Steering Wheel-Mounted Cruise Control | |
| 90L | Power Equipment Group | \$915.00 |
| | <i>Deletes passenger-side lock cylinder. Includes upgraded door trim panel.</i> <i>Includes:</i> - Accessory Delay - Manual Telescoping/Folding Trailer Tow Mirrors <i>Includes power heated glass, heated convex spotter mirror and integrated clearance lights and turn signal indicators.</i> - Advanced Security Pack <i>Includes SecuriLock Passive Anti-Theft System (PATS) and inclination/intrusion sensors.</i> - Power Locks - Power Tailgate Lock - Power Front & Rear Seat Windows <i>Includes 1-touch up/down driver/passenger window.</i> - Remote Keyless Entry | |
| 473 | Snow Plow Prep Package | \$185.00 |
| | REQUIRES Extra Extra Heavy-Duty Alternator (67E) when ordered with Upfitter Switches (66S) and 110V/400W Outlet (43C). <i>Includes computer selected springs for snowplow application. NOTE 1: Restrictions apply; see Supplemental Reference or Body Builders Layout Book for details. NOTE 2: May result in deterioration of ride quality when vehicle is not equipped with snowplow.</i> <i>Includes:</i> - Extra Heavy-Duty 200 Amp Alternator | |
| 52B | Trailer Brake Controller | \$270.00 |
| | <i>Verified to be compatible with select electric over hydraulic brakes. Includes smart trailer tow connector.</i> | |
| PAINT | Monotone Paint Application | STD |
| 585_ | Radio: AM/FM Stereo/MP3 Player | Included |
| | <i>Includes 6 speakers.</i> <i>Includes:</i> - SYNC Communications & Entertainment System <i>Includes enhanced voice recognition with 911 Assist, 4.2" LCD center stack screen, AppLink, 1 smart-charging USB port and steering wheel audio controls.</i> | |
| Emissions | | |
| 425 | 50-State Emissions System | STD |
| Interior Colors | | |
| AS_01 | Medium Earth Gray | N/C |
| Primary Colors | | |
| N1_01 | Blue Jeans Metallic | N/C |

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Community Ford of Bloomington
 2200 S Walnut St, Bloomington, Indiana, 474016520
 Office: 812-331-2200
 Fax: 812-331-3377

2019 F-150 Super Cab
 4x4 SD Super Cab 8' box 164" WB SRW
 XL(X2B)
 Price Level: 950 Quote ID: LIFEDESIGN

Selected Options (cont'd)

| Code | Description | MSRP |
|------|--------------------|--------------------|
| | SUBTOTAL | \$41,415.00 |
| | Destination Charge | \$1,595.00 |
| | TOTAL | \$43,010.00 |

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Community Ford of Bloomington
 2200 S Walnut St, Bloomington, Indiana, 474016520
 Office: 812-331-2200
 Fax: 812-331-3377

2019 F-150 Super Cab
 4x4 SD Super Cab 8' box 164" WB SRW XL(X2B)
 Price Level: 950 Quote ID: LIFEDESGNS

Major Equipment

(Based on selected options, shown at right)

6.2L V-8 SOHC w/SMPI 385hp
 TorqShift-G 6 speed automatic w/OD

- * Rear locking differential driver selectable
- * Brake assistance
- * LT 245/75R17 E BSW AT S-rated tires
- * Firm suspension
- * Air conditioning
- * AM/FM stereo with seek-scan, external memory control
- * Daytime running
- * Variable intermittent wipers
- * Dual front airbags w/passenger cancel
- * SecuriLock immobilizer
- * Message Center
- * Reclining front split-bench seats
- * Audio control on steering wheel
- * Front axle capacity: 6000 lbs.
- * Front spring rating: 5600 lbs.
- * Frame section modulus: 10.7 cu.in.
- * Cab to axle: 56.1"

Exterior:Blue Jeans Metallic
 Interior:Medium Earth Gray

- * 4-wheel ABS
- * Traction control
- * Battery with run down protection
- * Advance Trac w/Roll Stability Control
- * Tinted glass
- * Bluetooth streaming audio
- * Dual power remote heated mirrors
- * 17 x 7.5 steel wheels
- * Driver and front passenger seat mounted side airbags
- * Tachometer
- * Underseat ducts
- * 60-40 folding rear split-bench
- * Class V hitch
- * Rear axle capacity: 6200 lbs.
- * Rear spring rating: 6340 lbs.
- * Frame Yield Strength 50000 psi

Fuel Economy

City
N/A



Hwy
N/A

Selected Options

MSRP

| | |
|--|-------------|
| STANDARD VEHICLE PRICE | \$38,490.00 |
| Order Code 600A | N/C |
| 164" Wheelbase | STD |
| Monotone Paint Application | STD |
| 50-State Emissions System | STD |
| Electronic-Locking w/3.73 Axle Ratio | \$390.00 |
| Tires: LT245/75Rx17E BSW A/T | \$165.00 |
| XL Value Package | \$1,000.00 |
| Power Equipment Group | \$915.00 |
| Snow Plow Prep Package | \$185.00 |
| Blue Jeans Metallic | N/C |
| Medium Earth Gray | N/C |
| Engine: 6.2L 2-Valve SOHC EFI NA V8 Flex-Fuel | Included |
| Transmission: TorqShift-G 6-Spd Auto w/SelectShift | Included |
| GVWR: 10,000 lb Payload Package | Included |
| Wheels: 17" Argent Painted Steel | Included |
| HD Vinyl 40/20/40 Split Bench Seat | Included |
| 4.2" Center-Stack Screen | Included |
| Radio: AM/FM Stereo/MP3 Player | Included |
| SYNC Communications & Entertainment System | Included |
| Bright Chrome Hub Covers & Center Ornaments | Included |

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Community Ford of Bloomington
 2200 S Walnut St, Bloomington, Indiana, 474016520
 Office: 812-331-2200
 Fax: 812-331-3377

2019 F-150 Design Super Cab
 4x4 SD Super Cab 8' box 164" WB SRW XL(X2B)
 Price Level: 950 Quote ID: LIFEDESGNS

| | |
|--|--------------------|
| Chrome Front Bumper | Included |
| Chrome Rear Step Bumper | Included |
| Steering Wheel-Mounted Cruise Control | Included |
| Accessory Delay | Included |
| Manual Telescoping/Folding Trailer Tow Mirrors | Included |
| Advanced Security Pack | Included |
| Power Locks | Included |
| Power Tailgate Lock | Included |
| Power Front & Rear Seat Windows | Included |
| Remote Keyless Entry | Included |
| Extra Heavy-Duty 200 Amp Alternator | Included |
| Trailer Brake Controller | \$270.00 |
| <hr/> | |
| SUBTOTAL | \$41,415.00 |
| Destination Charge | \$1,595.00 |
| <hr/> | |
| TOTAL | \$43,010.00 |

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Prepared for: **STEPHANIE DHELTON**
 By: **Sam Roberts** Date: **03/22/2019**



Community Ford of Bloomington
 2200 S Walnut St, Bloomington, Indiana, 474016520
 Office: 812-331-2200
 Fax: 812-331-3377

2019 F-150 Super Cab
 4x4 SD Super Cab 8' box 164" WB SRW
 XL(X2B)
 Price Level: 950 Quote ID: LIFEDESIGN

Pricing - Single Vehicle

| | | MSRP |
|---|--|--------------------|
| <i>Vehicle Pricing</i> | | |
| Base Vehicle Price | | \$38,490.00 |
| Options & Colors | | \$2,925.00 |
| Upfitting | | \$0.00 |
| Destination Charge | | \$1,595.00 |
| Subtotal | | \$43,010.00 |
| <i>Pre-Tax Adjustments</i> | | |
| Code | Description | |
| QS029 | INDIANA Government Bid Discounts Applied | -\$11,528.00 |
| Subtotal | | \$31,482.00 |
| <i>Post-Tax Adjustments</i> | | |
| Code | Description | |
| 45-Temp <small>IN. BMV 45-Day Temp tag</small> | 45-Day Temporary License Plate | \$6.00 |
| IN TIRE/ENV Fee | State of Indiana New Tire / Environmental Fees | \$1.25 |
| Total | | \$31,489.25 |

Customer Signature

Acceptance Date

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Available Options

| Code | Description | MSRP |
|-------------------|---|------------|
| Packages | | |
| 600A | Order Code 600A | N/C |
| | <i>Includes:</i> - Engine: 6.2L 2-Valve SOHC EFI NA V8 Flex-Fuel Flex-Fuel badge on fleet orders only. - Transmission: TorqShift-G 6-Spd Auto w/SelectShift - 3.73 Axle Ratio - GVWR: 10,000 lb Payload Package - Tires: LT245/75R17E BSW A/S (4) - Wheels: 17" Argent Painted Steel Includes painted hub covers/center ornaments. - HD Vinyl 40/20/40 Split Bench Seat Includes center armrest, cupholder, storage and driver's side manual lumbar. - Radio: AM/FM Stereo Includes digital clock and 4 speakers. | |
| Powertrain | | |
| 996 | Engine: 6.2L 2-Valve SOHC EFI NA V8 Flex-Fuel | STD |
| | <i>Flex-Fuel badge on fleet orders only.</i> | |
| 99T | Engine: 6.7L 4V OHV Power Stroke V8 Turbo Diesel B20 | \$9,120.00 |
| | <i>Includes manual push-button engine-exhaust braking and intelligent oil-life monitor.</i> <i>Includes:</i> - 3.31 Axle Ratio - 175 Amp Heavy Duty Alternator - Dual 78-AH 750 CCA Batteries - 34 Gallon Fuel Tank | |
| 44S | Transmission: TorqShift-G 6-Spd Auto w/SelectShift | STD |
| 44W | Transmission: TorqShift 6-Speed Automatic | N/C |
| | <i>(6R140). Includes SelectShift.</i> | |
| X37 | 3.73 Axle Ratio | STD |
| X31 | 3.31 Axle Ratio | N/C |
| X35 | 3.55 Axle Ratio | N/C |
| X3E | Electronic-Locking w/3.73 Axle Ratio | \$390.00 |

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Available Options (cont'd)

| Code | Description | MSRP |
|--|---|----------|
| X4M | Electronic-Locking w/4.30 Axle Ratio | \$390.00 |
| X3H | Electronic-Locking w/3.31 Axle Ratio | \$390.00 |
| X3J | Electronic-Locking w/3.55 Axle Ratio | \$390.00 |
| STDGV | GVWR: 10,000 lb Payload Package | STD |
| 68D | GVWR: 9,900 lb Payload Package | N/C |
| 98F | CNG/Propane Gaseous Engine Prep Package | \$315.00 |
| <p><i>Includes hardened engine intake valves, valve seats and bi-fuel manifold. NOTE: This package does not include CNG/Propane fuel tanks, lines, etc. Vehicle will be equipped with the standard factory gasoline fuel system. Additional equipment combined with Certified calibration reflash is required, from an external upfitter, to convert the vehicle to a CNG/Propane fueled vehicle. See Alternative Fuel Buyers Guide: www.ford.com/altfuelbuyersguide. Ford Motor Company does not provide an exhaust or evaporative emissions certificate with this option when converted to use CNG or Propane fuel. Ford does not represent that a vehicle converted to use CNG or Propane will comply with all applicable U.S. or Canadian safety standards. It is the responsibility of the final stage manufacturer (body-builder, installer, alterer or subsequent stage manufacturer) to determine that any vehicle converted to use CNG or Propane complies with U.S. Federal, California or Canadian exhaust and evaporative emission requirements, Federal fuel economy standards, U.S. and Canadian safety standards, labeling and any other requirements.</i></p> | | |

Wheels & Tires

| | | |
|-----|--|----------|
| TD8 | Tires: LT245/75Rx17E BSW A/S (4) | STD |
| TCH | Tires: LT275/65Rx18E BSW A/S | N/C |
| TBM | Tires: LT245/75Rx17E BSW A/T | \$165.00 |
| TCD | Tires: LT265/70Rx17E OWL A/T | \$455.00 |
| TDX | Tires: LT275/70Rx18E BSW A/T (4) | \$265.00 |
| TDU | Tires: LT275/70Rx18E OWL A/T (4) <i>Includes LT275/70Rx18E BSW A/T spare tire.</i> | \$290.00 |
| 64A | Wheels: 17" Argent Painted Steel <i>Includes painted hub covers/center ornaments.</i> | STD |

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Available Options (cont'd)

| Code | Description | MSRP |
|------|--|----------|
| 648 | Wheels: 18" Sparkle Silver Painted Cast Aluminum <i>Includes bright hub covers/center ornaments.</i> | N/C |
| 512 | Spare Tire, Wheel, Carrier & Jack Spare tire is standard equipment; becomes optional when (66D) Pickup Box Delete is ordered. | \$295.00 |

Seats & Seat Trim

| | | |
|---|---|----------|
| A | HD Vinyl 40/20/40 Split Bench Seat <i>Includes center armrest, cupholder, storage and driver's side manual lumbar.</i> | STD |
| 1 | Cloth 40/20/40 Split Bench Seat <i>Includes center armrest, cupholder, storage and driver's side manual lumbar.</i> | \$100.00 |

Other Options

| | | |
|-------|---|------------|
| 164WB | 164" Wheelbase | STD |
| 96V | XL Value Package <i>Includes:</i> <ul style="list-style-type: none"> - 4.2" Center-Stack Screen - Radio: AM/FM Stereo/MP3 Player - Includes 6 speakers. - SYNC Communications & Entertainment System - Includes enhanced voice recognition with 911 Assist, 4.2" LCD center stack screen, AppLink, 1 smart-charging USB port and steering wheel audio controls. - Bright Chrome Hub Covers & Center Ornaments - Chrome Front Bumper - Chrome Rear Step Bumper - Steering Wheel-Mounted Cruise Control | \$1,000.00 |
| 17S | STX Appearance Package <i>Includes STX fender vent badge.</i> <i>Includes:</i> <ul style="list-style-type: none"> - Radio: AM/FM Stereo/MP3 Player - Includes 6 speakers. - SYNC Communications & Entertainment System - Includes enhanced voice recognition with 911 Assist, 4.2" LCD center stack screen, AppLink, 1 smart-charging USB port and steering wheel audio controls. - Bright Chrome Grille - Bright Chrome Hub Covers & Center Ornaments - Chrome Front Bumper - Chrome Rear Step Bumper - Steering Wheel-Mounted Cruise Control - Wheels: 18" Sparkle Silver Painted Cast Aluminum - Includes bright hub covers/center ornaments. - Tires: LT275/65R18E BSW A/S | \$1,690.00 |

Prices and content availability as shown are subject to change and should be treated as estimates only. Actual base vehicle, package and option pricing may vary from this estimate because of special local pricing, availability or pricing adjustments not reflected in the dealer's computer system. See salesperson for the most current information.



Available Options (cont'd)

| Code | Description | MSRP |
|------|--|------------|
| 90L | <p>Power Equipment Group</p> <p><i>Deletes passenger-side lock cylinder. Includes upgraded door trim panel.</i> <i>Includes:</i></p> <ul style="list-style-type: none"> - Accessory Delay - Manual Telescoping/Folding Trailer Tow Mirrors <i>Includes power heated glass, heated convex spotter mirror and integrated clearance lights and turn signal indicators.</i> - Advanced Security Pack <i>Includes SecuriLock Passive Anti-Theft System (PATS) and inclination/intrusion sensors.</i> - Power Locks - Power Tailgate Lock - Power Front & Rear Seat Windows <i>Includes 1-touch up/down driver/passenger window.</i> - Remote Keyless Entry | \$915.00 |
| 17X | <p>FX4 Off-Road Package</p> <p><i>Includes:</i></p> <ul style="list-style-type: none"> - Hill Descent Control - Off-Road Specifically Tuned Shock Absorbers <i>Includes front/rear.</i> - Transfer Case & Fuel Tank Skid Plates - Unique FX4 Off-Road Box Decal | \$400.00 |
| 473 | <p>Snow Plow Prep Package</p> <p><i>Includes computer selected springs for snowplow application. NOTE 1: Restrictions apply; see Supplemental Reference or Body Builders Layout Book for details. NOTE 2: May result in deterioration of ride quality when vehicle is not equipped with snowplow.</i></p> | \$185.00 |
| 471 | <p>Camper Package</p> <p><i>Includes heavy-service front springs (1 up upgrade above the spring computer selected as a consequence of options chosen. Not included if maximum springs have been computer selected as standard equipment), rear auxiliary springs and slide-in camper certification. NOTE 1: Salesperson's Source Book or Ford RV Trailer Towing Guide should be consulted for specific trailer towing or camper limits and corresponding required equipment, axle ratios and model availability. NOTE 2: May result in deterioration of ride quality when vehicle is not equipped with camper.</i> <i>Includes:</i></p> <ul style="list-style-type: none"> - Rear Stabilizer Bar | \$160.00 |
| 47B | <p>Snow Plow/Camper Package</p> <p><i>Includes computer selected springs for snowplow application and heavy service front springs (1 up upgrade above the spring computer selected as a consequence of options chosen. Not included if maximum springs have been computer selected as standard equipment) and slide-in camper certification. NOTE 1: Salesperson's Source Book or Ford RV Trailer Towing Guide should be consulted for specific trailer towing or camper limits and corresponding required equipment, axle ratios and model availability. Restrictions apply; see Supplemental Reference or Body Builders Layout Book for details. Expect firmer ride when vehicle is not equipped with snowplow and/or camper. NOTE 2: May result in deterioration of ride quality when vehicle is not equipped with snowplow and/or camper.</i> <i>Includes:</i></p> <ul style="list-style-type: none"> - Rear Stabilizer Bar | \$245.00 |
| 535 | <p>High Capacity Trailer Tow Package</p> <p><i>Includes increased GCW from 23,500 lbs. to 25,700 lbs and upgraded axle. NOTE: Salesperson's Portfolio or Trailer Towing Guide should be consulted for specific trailer towing or camper limits and corresponding required equipment, axle ratios and model availability. See Supplemental Reference for vehicle height consideration.</i></p> | \$1,130.00 |

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Available Options (cont'd)

| Code | Description | MSRP |
|------|---|-----------|
| 67H | Heavy-Service Front Suspension Package <i>Includes heavy-service front springs (1 up upgrade above the spring computer selected as a consequence of options chosen. Not included if maximum springs have been computer selected as standard equipment). Recommended only on vehicles which will permanently utilize aftermarket equipment such as heavy-duty winches, brush guards or other apparatus which loads the front axle to the specified Gross Axle Weight Rating (GAWR). NOTE 1: Vehicle ride height will increase with the addition of this package. NOTE 2: May result in deterioration of ride quality when vehicle is not equipped with front end utility attachment.</i> | \$125.00 |
| 63R | Heavy-Service Package for Pickup Box Delete <i>Includes heavy-service front springs (200 lbs. upgrade above the spring computer selected as a consequence of options chosen. Not included if maximum springs have been computer selected as standard equipment) and rear auxiliary springs. NOTE: Salesperson's Source Book or Ford RV Trailer Towing Guide should be consulted for specific trailer towing or camper limits and corresponding required equipment, axle ratios and model availability.</i> <i>Includes:</i> - Rear Stabilizer Bar | \$125.00 |
| 66D | Pickup Box Delete <i>Deletes tie-down hooks, tailgate, rearview camera, 7/4 pin connector and center high-mounted stop lamp (CHMSL) (only on vehicles over 10,000 lbs.GVWR). Incomplete vehicle package - requires further manufacture and certification by a final stage manufacturer. In addition, Ford urges manufacturers to follow the recommendations of the Ford Incomplete Vehicle Manual and the Ford Truck Body Builder's Layout Book (and applicable supplements).</i> <i>Includes:</i> - Rear Bumper Delete - Spare Wheel, Tire, Carrier & Jack Delete | -\$625.00 |
| 41P | Transfer Case & Fuel Tank Skid Plates | \$100.00 |
| 21M | Manual Shift On Stop <i>Deletes Electronic Shift On the Fly functionality.</i> | N/C |
| 41H | Engine Block Heater | \$100.00 |
| 62R | Transmission Power Take-Off Provision <i>Includes transmission mounted live drive and stationary mode PTO.</i> | \$280.00 |
| 86A | Engine Idle Shut Down - 5 Minutes <i>After a predetermined period, the engine PCM automatically shuts down the engine and triggers the accessory module to shutdown power to the accessories to minimize battery drain.</i> | \$250.00 |
| 86B | Engine Idle Shut Down - 10 Minutes <i>After a predetermined period, the engine PCM automatically shuts down the engine and triggers the accessory module to shutdown power to the accessories to minimize battery drain.</i> | \$250.00 |

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Available Options (cont'd)

| Code | Description | MSRP |
|------|---|----------|
| 86C | Engine Idle Shut Down - 15 Minutes <i>After a predetermined period, the engine PCM automatically shuts down the engine and triggers the accessory module to shutdown power to the accessories to minimize battery drain.</i> | \$250.00 |
| 86D | Engine Idle Shut Down - 20 Minutes <i>After a predetermined period, the engine PCM automatically shuts down the engine and triggers the accessory module to shutdown power to the accessories to minimize battery drain.</i> | \$250.00 |
| 98R | Operator Commanded Regeneration (OCR) | \$250.00 |
| 86M | Medium Duty Battery - Dual 78 AH | \$210.00 |
| 66B | BoxLink | \$75.00 |
| 60B | Blind Spot Information System (BLIS) <i>Includes cross-traffic alert and trailer tow (BLIS sensor in taillamp).</i> | \$540.00 |
| 67E | Extra Extra Heavy-Duty Alternator (240 Amp) | Variable |
| 67A | Dual Alternators (Total 332-Amps) | N/C |
| 67B | Dual Extra Heavy-Duty Alternators (Total 377-Amps) | \$115.00 |
| 66L | LED Box Lighting <i>Includes LED Center High-Mounted Stop Lamp (CHMSL).</i> | \$60.00 |
| 52B | Trailer Brake Controller <i>Verified to be compatible with select electric over hydraulic brakes. Includes smart trailer tow connector.</i> | Variable |
| 53W | 5th Wheel/Gooseneck Hitch Prep Package | \$500.00 |

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Available Options (cont'd)

| Code | Description | MSRP |
|-------|---|----------|
| | <i>Includes 5 pickup bed attachment points with plugs, 1 frame under-bed cross member and 1 integrated 7-pin connector on driver's side pickup bed wall. 5th wheel hitch compatibility: the 5th Wheel/Gooseneck Prep Package (53W) is compatible with the factory orderable 5th Wheel Hitch Kits (15K and 15L) and dealer-installed Ford accessories 5th Wheel Hitch Kit by Reese - part #BC3Z-19D520-A (8ft box only). The prep package is also compatible with Reese Signature Series 5th wheel hitch kits updated with a new Leg Service Kit - part #BC3Z-A00A25-A (8ft box only). The 5th Wheel Hitch Kit (15K), 5th Wheel Hitch Kit (15L) and dealer-installed Ford accessories 5th Wheel Hitch Kit by Reese - part #BC3Z-19D520-A is not released to the short box (6.75ft box). NOTE: the short pickup box provides less clearance between the cab and 5th wheel trailer compared to long box pickups. The receiver centerline of the hitch should be mounted at least 2" forward from the rear-axle of the truck chassis. When selecting a trailer and tow vehicle, it's critical that this combination provide clearance between the cab and tow vehicle for turns up to and including 90 degrees. Failure to follow this recommendation could result in the trailer contacting the cab of the tow vehicle during tight turns. Gooseneck hitch compatibility: the 5th Wheel/Gooseneck Prep Package (53W) is compatible only with the factory orderable Gooseneck Hitch Kit (15J) or dealer-installed Ford customer accessories Gooseneck Hitch by Reese - part #BC3Z-19F503-A (8ft box and 6.75 ft box).</i> | |
| 18B | Platform Running Boards | \$445.00 |
| 18C | 6" Angular Chrome Step Bar | \$695.00 |
| 872 | Rear View Camera & Prep Kit | \$415.00 |
| | <i>Pre-installed content includes cab wiring, frame wiring to the rear most cross member and video display with electronic mirror and 4" display. Upfitters kit includes camera with mounting bracket, 14' jumper wire and camera mounting and aiming instructions.</i> | |
| 873 | Rear CHMSL Camera | \$200.00 |
| | <i>Display in center stack screen. Includes LED Center High-Mounted Stop Lamp (CHMSL) with cargo light and rear video camera.</i> | |
| 874 | Ultimate Trailer Tow Camera System | \$710.00 |
| | <i>Includes 360 degree camera system and trailer reverse guidance. Display appears in center-stack screen. NOTE: Does not include customer placed trailer camera. Includes: - Rear CHMSL Camera Display in center stack screen. Includes LED Center High-Mounted Stop Lamp (CHMSL) with cargo light and rear video camera.</i> | |
| 592 | LED Roof Clearance Lights | \$95.00 |
| 85G | Tailgate Step & Handle | \$375.00 |
| 85S | Tough Bed Spray-In Bedliner | \$595.00 |
| | <i>Includes tailgate-guard, black box bed tie-down hooks and black bed attachment bolts.</i> | |
| PAINT | Monotone Paint Application | STD |
| 43B | Fixed Rear-Window w/Defrost | \$60.00 |

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Available Options (cont'd)

| Code | Description | MSRP |
|------|--|----------|
| 435 | Power-Sliding Rear-Window w/Defrost <i>Includes driver/passenger sun visors with illuminated vanity covered mirrors.</i> | \$405.00 |
| 924 | Privacy Glass | \$30.00 |
| 43C | 110V/400W Outlet <i>Includes 1 in-dash mounted outlet.</i> | \$175.00 |
| 16F | Color-Coordinated Full Carpet w/Floor Mats | \$60.00 |
| 41A | Rapid-Heat Supplemental Cab Heater (Rgnl) (DISC) No longer available for factory ordering as of May 29, 2018. Standard in Alaska, Colorado, Iowa, Idaho, Maine, Michigan, Minnesota, Montana, North Dakota, New Hampshire, New York, South Dakota, Vermont, Wisconsin and Wyoming with 6.7L Power Stroke Diesel engine (99T). Optional in all other states with 6.7L Power Stroke Diesel engine. <i>Includes:</i> <i>- Dual Extra Heavy-Duty Alternators (Total 377-Amps)</i> | N/C |
| 41A_ | Rapid-Heat Supplemental Cab Heater <i>Includes:</i> <i>- Dual Extra Heavy-Duty Alternators (Total 377-Amps)</i> | \$250.00 |
| 76S | Remote Start System | \$250.00 |
| 66S | Upfitter Switches (6) <i>Located in overhead console.</i> | \$165.00 |
| 587 | Radio: AM/FM Stereo <i>Includes digital clock and 4 speakers.</i> | STD |
| 585_ | Radio: AM/FM Stereo/MP3 Player <i>Includes 6 speakers.</i> <i>Includes:</i> <i>- SYNC Communications & Entertainment System</i> <i>Includes enhanced voice recognition with 911 Assist, 4.2" LCD center stack screen, AppLink, 1 smart-charging USB port and steering wheel audio controls.</i> | N/C |

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Available Options (cont'd)

| Code | Description | MSRP |
|------|---|----------|
| 913 | SYNC 3 Communications & Entertainment System <i>Includes enhanced voice recognition, 8" LCD capacitive touch screen in center stack with swipe capability, pinch-to-zoom capability included with available voice-activated touchscreen navigation system, 4.2" productivity screen in IP cluster, AppLink, 911 Assist, Apple CarPlay and Android Auto and 2 smart charging USB ports. NOTE: SYNC AppLink lets you control some of your favorite compatible mobile apps with your voice. It is compatible with select smartphone platforms. Commands may vary by phone and AppLink software.</i> | \$450.00 |
| 87S | FordPass Connect 4G Wi-Fi Modem <i>Includes 4G LTE Wi-Fi hotspot that connects up to 10 devices (includes a complimentary trial subscription of 3 months or 3 gigabytes - whichever comes first. Wireless service plan required after trial subscription ends. Visit atf.com/ford to start complimentary trial and sign up for a wireless service plan). Remote start with specific time scheduling, lock and unlock, locate parked vehicle and check vehicle status services are included for 1 year from the vehicle sale date as recorded by the dealer. Note: Ford Telematics Prep included for fleet only. FordPass Connect 4G Wi-Fi modem enables telematics services through authorized partners. Activate at www.fleet.ford.com or call 833-FCS-FORD or 833-327-3673.</i> | \$225.00 |
| 39S | SiriusXM Radio <i>Includes 1 I/P mounted center speaker. SiriusXM Traffic and Travel Link includes a 5-year prepaid subscription. Services are not available in Alaska and Hawaii. Subscriptions to all SiriusXM services are sold by SiriusXM after trial period. If you decide to continue service after your trial, the subscription plan you choose will automatically renew thereafter and you will be charged according to your chosen payment method at then-current rates. Fees and taxes apply. To cancel you must call SiriusXM at 1-866-635-2349. See SiriusXM Customer Agreement for complete terms at www.siriusxm.com. All fees and programming subject to change. SiriusXM and all related marks and logos are trademarks of SiriusXM Radio Inc.</i> | \$185.00 |
| 62X | Aluminum Crossbed Toolbox (Pre-Installed) <i>Defender Series by Weather Guard.</i> | \$575.00 |
| 62Y | Premium Aluminum Crossbed Toolbox (Pre-Installed) <i>Model #127-0-02 by Weather Guard.</i> | \$790.00 |
| 52R | Stowable Loading Ramps (Pre-Installed) REQUIRES second unit body. | \$695.00 |
| 91S | Amber LED Warning Strobes (Pre-Installed) <i>Includes center high-mounted stop light bar and 2 hood mounted lights.</i> | \$675.00 |
| 91G | Amber-White LED Warning Strobes (Pre-Installed) <i>Includes center high-mounted stop light bar and 2 hood mounted lights.</i> | \$725.00 |
| 87H | Black Molded Hood Deflector (Pre-Installed) | \$130.00 |

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Available Options (cont'd)

| Code | Description | MSRP |
|------|--|------------|
| 85L | Drop-In Bedliner (Pre-Installed) | \$350.00 |
| 61L | Front Wheel Well Liners (Pre-Installed) | \$180.00 |
| 61M | Rear Wheel Well Liners (Pre-Installed) | \$180.00 |
| 61N | Front & Rear Wheel Well Liners (Pre-Installed) <i>Custom accessory.</i> | \$325.00 |
| 85M | Bed Mat (Pre-Installed) <i>Custom accessory.</i> | \$150.00 |
| 61S | Front Splash Guards/Mud Flaps (Pre-Installed) <i>Custom accessory.</i> | \$130.00 |
| 62S | Rear Splash Guards/Mud Flaps (Pre-Installed) <i>Custom accessory.</i> | N/C |
| 76C | Exterior Backup Alarm (Pre-Installed) <i>Custom accessory.</i> | \$140.00 |
| 15J | Gooseneck Hitch Kit (Pre-Installed) | \$250.00 |
| 15L | 18K 5th Wheel Hitch Kit (Pre-Installed) | \$1,095.00 |
| 79V | COV Required | N/A |
| C09 | Priced DORA | N/C |

Fleet Options

| | | |
|-----|--|----------|
| 17F | XL Decor Group (LPO) Requires valid FIN code. | \$220.00 |
|-----|--|----------|

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Available Options (cont'd)

| Code | Description | MSRP |
|------|--|----------|
| | <i>Includes:</i> - Bright Chrome Hub Covers & Center Ornaments - Chrome Front Bumper - Chrome Rear Step Bumper | |
| 525 | Steering Wheel-Mounted Cruise Control (LPO) Requires valid FIN code. | \$235.00 |
| 942 | Daytime Running Lamps (DRL) (LPO) Requires valid FIN code. <i>The non-controllable 942 Daytime Running Lamps (DRL) replace the standard Daytime Running Lamps (DRL) on/off cluster controllable.</i> | \$45.00 |
| 87T | Fleet Telematics Modem Requires valid FIN code. <i>Onboard modem device provides access to data to support telematics services including but not limited to vehicle location, speed, idle time, fuel, vehicle diagnostics and maintenance alerts. Device enables telematics services through authorized partners. Activate at www.fleet.ford.com or call 833-FCS-FORD or 833-327-3673.</i> | \$225.00 |
| 51X | Spare Wheel & Tire Delete (LPO) Requires valid FIN code. <i>Also deletes jack and frame-mounted carrier.</i> | -\$85.00 |
| 926 | Speed Limitation - 65-MPH Governed Top Speed (LPO) Requires valid FIN code. | \$80.00 |
| 927 | Speed Limitation - 75-MPH Governed Top Speed (LPO) Requires valid FIN code. | \$80.00 |
| 18A | Upfitter Interface Module (LPO) Requires valid FIN code. | \$295.00 |
| D9E | Built: Kentucky Truck Plant | N/C |
| 31S | Ship-Thru: Reading Equipment | N/C |

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Available Options (cont'd)

| Code | Description | MSRP |
|------|---|--------|
| 31A | Ship-Thru: Altec | N/C |
| 31V | Ship-Thru: Knapheide Truck Equipment | \$0.00 |
| 31C | Ship-Thru: Zoresco Equipment | \$0.00 |
| 31E | Ship-Thru: L&Z Co. | \$0.00 |
| 31L | Ship-Thru: Auto Truck | N/C |
| 31M | Ship-Thru: Manning Light Truck Equipment | N/C |
| 31N | Ship-Thru: Monroe Truck Equipment | N/C |
| 31G | Ship-Thru: NBC Truck Equipment | \$0.00 |
| 31B | Ship-Thru: Reading Equipment | \$0.00 |
| 31P | Ship-Thru: Roush Industries | \$0.00 |
| 31F | Ship-Thru: Venchurs Vehicle System | \$0.00 |
| 31W | Ship-Thru: Knapheide - IN | N/C |
| 316 | Ship-Thru: Westport Dallas Inc | \$0.00 |
| 314 | Ship-Thru: Reading Equipment & Distribution | \$0.00 |
| 319 | Ship-Thru: KC Truck Systems Inc. | \$0.00 |
| 315 | Ship-Thru: Alt Fuel Innovations, LLC (AFI) | \$0.00 |

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Available Options (cont'd)

| Code | Description | MSRP |
|--------|--|----------|
| 31U | Ship-Thru: General Truck Body | N/C |
| FLADCR | Fleet Advertising Credit | \$0.00 |
| FINAL2 | Fleet Final Order Date: 08/02/2019 | N/C |
| 56M | Ford US National Fleet Incentives Ford US National - 02/15/19 | Variable |
| L | Vinyl 40/Mini-Console/40 Front Seat (Fleet) <i>Includes driver's side manual lumbar.</i> | \$355.00 |
| 4 | Cloth 40/Mini-Console/40 Front Seat (Fleet) <i>Includes driver's side manual lumbar.</i> | \$515.00 |
| 43C_ | 110V/400W Outlet (Fleet) <i>Includes 1 in-dash mounted outlet.</i> | \$175.00 |
| 76R | Reverse Sensing System (Fleet) | \$245.00 |
| 585 | Radio: AM/FM Stereo/MP3 (LPO) (Fleet) Requires valid FIN code. <i>Includes 6 speakers.</i> <i>Includes:</i> <i>- SYNC Communications & Entertainment System</i> <i>Includes enhanced voice recognition with 911 Assist, 4.2" LCD center stack screen, AppLink, 1 smart-charging USB port and steering wheel audio controls.</i> | \$550.00 |
| 913_ | SYNC 3 Communications & Entertainment System (FLT) <i>Includes enhanced voice recognition, 8" LCD capacitive touch screen in center stack with swipe capability, pinch-to-zoom capability included with available voice-activated touchscreen navigation system, 4.2" productivity screen in IP cluster, AppLink, 911 Assist, Apple CarPlay and Android Auto and 2 smart charging USB ports. NOTE: SYNC AppLink lets you control some of your favorite compatible mobile apps with your voice. It is compatible with select smartphone platforms. Commands may vary by phone and AppLink software.</i> | \$450.00 |

Emissions

| | | |
|-----|---------------------------|-----|
| 425 | 50-State Emissions System | STD |
|-----|---------------------------|-----|

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Community Ford of Bloomington
 2200 S Walnut St, Bloomington, Indiana, 474016520
 Office: 812-331-2200
 Fax: 812-331-3377

2019 F-150 Super Cab
 4x4 SD Super Cab 8' box 164" WB SRW
 XL(X2B)
 Price Level: 950 Quote ID: LIFEDESIGN

Available Options (cont'd)

| Code | Description | MSRP |
|---------------------|--------------------------------|------|
| General Info | | |
| ORDER1 | Initial Order Date: 03/06/2018 | N/C |
| START1 | Start-Up Date: 07/09/2018 | N/C |
| FINAL1 | Final Order Date: TBA | N/C |
| BUILD1 | Build-Out Date: 11/14/2019 | N/C |

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2019 F-150 Super Cab
 4x4 SD Super Cab 8' box 164" WB SRW
 XL(X2B)
 Price Level: 950 Quote ID: LIFEDESIGN

Warranty - Standard Equipment & Specs

Warranty

Basic

Distance 36,000 miles Months 36 months

Powertrain

Distance 60,000 miles Months 60 months

Corrosion Perforation

Distance Unlimited miles Months 60 months

Roadside Assistance

Distance 60,000 miles Months 60 months

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EN

CNGP530

VEHICLE ORDER CONFIRMATION

03/19/19 13:59:36

=>

Dealer: 47723

2019 F-SERIES SD

Page: 1 of 1

Order No: 9999 Priority: 19

Order Type: 1 Price Level: 950

Order PEP: 600A Cust/Flt Name: LIFE DESIGN

PO Number:

RETAIL

RETAIL

X2B F250 3/4 5/C \$38490

10000# GVWR PKG

164" WHEEL BASE

425 50 STATE EMISS NC

Z1 OXFORD WHITE

473 SNOW PLOW PKG 185

A VNYL 40/20/40

512 SPARE TIRE/WHL2 NC

S MEDIUM EARTH GR

JACK

600A PREF EQUIP PKG

67D XTR HVY DTY ALT NC

.XL TRIM

FUEL CHARGE

.TRAILER TOW PKG

DEST AND DELIV 1595

572 .AIR CONDITIONER NC

TOTAL BASE AND OPTIONS 40660

.AM/FM STER/CLK

TOTAL 40660

996 .6.2L EFI V8 ENG NC

THIS IS NOT AN INVOICE

44S 6-SPD AUTOMATIC NC

(2148)

TD8 .LT775 BSW AS 17

X3E .7.73 ELOCKING 390

JOB #1 BUILD

F1=Help

F2=Return to Order

F3/F12=Veh Ord Menu

F4=Submit

F5=Add to Library

S099 - PRESS F4 TO SUBMIT

QD04691

The handwritten part below shows price for plow and toolbox.

Ignore the part above...the quote for the truck is in another document.

38512

Plow PKG 5528

TOOL BOX
(SINGLE LID) 695

44735

LifeDesigns, Inc.
Total Agency
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|-----------------------------------|-------------------|-------------------|----------------------|----------------------|
| | Actual | Budget | Actual | Budget |
| Revenue | | | | |
| Service Revenue: | | | | |
| Group Home & Customer Liabilities | \$243,476.59 | \$242,685.31 | \$2,987,001.14 | \$2,912,223.72 |
| Rental Income | 13,031.28 | 14,621.58 | 162,948.16 | 175,458.96 |
| Private Pay | 4,401.36 | 5,652.16 | 57,931.91 | 67,825.92 |
| EMS | 15,972.86 | 7,267.41 | 78,812.17 | 87,208.92 |
| Respite | 1,996.04 | 4,413.91 | 40,036.99 | 52,966.92 |
| RH10 | 6,609.42 | 8,955.25 | 92,498.12 | 107,463.00 |
| RH20 | 217,729.77 | 169,589.33 | 2,403,003.77 | 2,035,071.96 |
| Trip Revenue | 8,684.77 | 11,311.74 | 124,531.00 | 135,740.88 |
| PAC | 10,211.40 | 13,433.75 | 136,322.80 | 161,205.00 |
| Daily Rate Revenue | 263,305.26 | 373,529.82 | 3,753,922.36 | 4,482,357.84 |
| VR | 31,485.03 | 30,666.66 | 456,738.91 | 367,999.92 |
| ATTC | 3,153.24 | 3,184.00 | 43,736.57 | 38,208.00 |
| Health Care Coordination/Wellness | 5,078.13 | 5,097.41 | 68,611.44 | 61,168.92 |
| Workplace Assistance | 110.76 | | 1,419.11 | |
| SF10 | 101.76 | 958.33 | 14,017.08 | 11,499.96 |
| CHIO | 18,016.29 | 23,541.74 | 239,324.72 | 282,500.88 |
| BMGT | 15,779.40 | 21,250.00 | 361,587.64 | 255,000.00 |
| CHGO | 5,895.65 | 6,959.75 | 105,673.07 | 83,517.00 |
| AFC3 | 3,086.10 | 3,086.08 | 37,547.55 | 37,032.96 |
| AF01 | 1,193.01 | 1,482.58 | 17,376.45 | 17,790.96 |
| Prior Year & Rate Adjustments | (622.00) | | (1,625.00) | |
| Total Service Revenue | 868,696.12 | 947,686.81 | 11,181,415.96 | 11,372,241.72 |
| Other Revenue: | | | | |
| Grant Revenue | | 3,198.00 | 312,219.23 | 38,376.00 |
| County Funding | 29,993.61 | 28,840.00 | 359,923.00 | 346,080.00 |
| Donations | 3,742.89 | 3,001.82 | 70,697.46 | 36,021.84 |
| Fundraising | 8,700.00 | 5,833.33 | 67,752.26 | 69,999.96 |
| Interest Income | 25,040.34 | | 25,416.67 | |
| Unrealized Gain on Endowment Fund | (80,199.48) | | (35,357.56) | |
| Misc Income | 128.00 | 31.25 | 98,417.46 | 375.00 |
| Dividend Income | 5,835.23 | 333.33 | 16,406.21 | 3,999.96 |
| Total Other Revenue | (6,759.41) | 41,237.73 | 915,474.73 | 494,852.76 |
| Total Revenue | 861,936.71 | 988,924.54 | 12,096,890.69 | 11,867,094.48 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Operations Salaries | 40,373.47 | 39,337.49 | 464,318.21 | 472,049.88 |
| Executive Salaries | 14,816.45 | 12,583.32 | 173,840.61 | 150,999.84 |
| AA/Typist | 10,924.19 | 12,329.15 | 131,353.27 | 147,949.80 |
| Day Program Salaries | 1,034.45 | 1,473.16 | 20,888.50 | 17,677.92 |
| Network Managers | 78,728.96 | 80,514.83 | 969,088.62 | 966,177.96 |
| Network Coordinator & EDC | 30,021.72 | 31,330.33 | 393,078.73 | 375,963.96 |
| Behavior Salaries | | 2,100.83 | 5,914.12 | 25,209.96 |
| Maintenance Salaries | 3,051.56 | 3,021.66 | 36,717.46 | 36,259.92 |
| DSP Salaries | 65,436.83 | 79,406.39 | 818,554.79 | 952,876.68 |
| Training Salaries | 8,339.79 | 14,227.50 | 124,638.30 | 170,730.00 |
| DOS | 15,638.04 | 13,473.08 | 151,465.87 | 161,676.96 |
| Group Home Mgr | 12,602.77 | 13,376.81 | 150,578.95 | 160,521.72 |
| Quality Assurance Coord | 3,226.60 | | 15,990.66 | |
| RN Salaries | 14,038.50 | 16,678.74 | 178,135.55 | 200,144.88 |
| Accrued PTO | (39,054.36) | 8,163.30 | 11,753.42 | 97,959.60 |
| Direct Service Staff Overtime | 25,220.42 | 16,142.98 | 226,059.52 | 193,715.76 |
| DSP Bonus | 384.47 | 9,166.66 | 146,325.52 | 109,999.92 |
| Laundry Salaries | 2,013.58 | 1,778.31 | 21,953.87 | 21,339.72 |
| DSP Private Pay | 174.73 | | 2,317.78 | |
| DSP OT Private Pay | 27.74 | | 27.74 | |
| DSP RH10 | 2,907.57 | 3,575.00 | 28,471.52 | 42,900.00 |
| DSP OT RH10 | 416.49 | 422.66 | 6,418.00 | 5,071.92 |
| DSP RH20 | 77,811.07 | 71,762.50 | 871,079.96 | 861,150.00 |
| DSP OT RH20 | 36,478.88 | 22,059.83 | 300,177.20 | 264,717.96 |
| DSP RH20 Emp/CEO | 306.06 | 75.00 | 2,891.02 | 900.00 |
| DSP PAC | 3,767.65 | 5,780.66 | 49,753.09 | 69,367.92 |
| DSP OT PAC | 1,036.28 | 629.33 | 9,875.61 | 7,551.96 |
| DSP Daily Rate | 71,610.33 | 133,881.00 | 1,159,792.40 | 1,606,572.00 |
| DSP OT Daily Rate | 36,801.98 | 41,155.83 | 458,470.44 | 493,869.96 |
| DSP ATTC | 1,862.55 | 2,246.66 | 25,931.18 | 26,959.92 |
| DSP OT ATTC | 178.66 | | 370.74 | |
| DSP CHIO | 4,319.32 | 11,301.41 | 82,934.47 | 135,616.92 |
| DSP OT CHIO | 1,056.66 | 1,213.33 | 15,731.80 | 14,559.96 |
| DSP RSPO | 747.64 | 1,482.91 | 11,067.88 | 17,794.92 |

LifeDesigns, Inc.
Total Agency
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|--|--------------------|---------------------|----------------------|----------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| DSP OT RSPO | \$140.04 | \$627.00 | \$3,207.63 | \$7,524.00 |
| DSP VR | 684.36 | 101.41 | 5,953.64 | 1,216.92 |
| DSP OT VR | 230.59 | | 1,725.13 | |
| DSP CHG Salaries: SLS Waiver | 799.89 | | 14,123.14 | |
| DSP OT CHG Salaries: SLS Waiver | <u>1,207.37</u> | | <u>7,962.41</u> | |
| Total Salaries | 529,363.30 | 651,419.07 | 7,098,938.75 | 7,817,028.84 |
| Benefits: | | | | |
| FICA | 38,419.78 | 47,804.78 | 519,793.34 | 573,657.36 |
| Pension Contribution | 8,232.43 | 3,948.41 | 42,449.44 | 47,380.92 |
| Unemployment Payout | 65.49 | 445.25 | 5,508.21 | 5,343.00 |
| Other Benefits | 82,587.00 | 90,830.31 | 969,651.29 | 1,089,963.72 |
| Employee Appreciation | <u>(2,533.17)</u> | <u>916.66</u> | <u>8,097.03</u> | <u>10,999.92</u> |
| Total Benefits | 126,771.53 | 143,945.41 | 1,545,499.31 | 1,727,344.92 |
| Other Variable Expenses | | | | |
| Independent Contractor | 74,009.40 | 40,878.72 | 639,033.49 | 490,544.64 |
| Nursing & Other Nursing | 600.59 | 666.63 | 5,262.09 | 7,999.56 |
| Dietician | | 370.82 | 3,127.50 | 4,449.84 |
| Food | 7,115.75 | 8,008.32 | 91,137.11 | 96,099.84 |
| Laundry Supplies | 119.01 | 170.83 | 1,326.14 | 2,049.96 |
| Housekeeping | 1,941.95 | 2,417.50 | 28,192.34 | 29,010.00 |
| Customer Reimbursable Expenses | 119.04 | | 791.70 | |
| Other Operations | 5,881.05 | 617.99 | 18,395.94 | 7,415.88 |
| Repairs & Maintenance | 1,215.17 | 9,239.13 | 123,005.78 | 110,869.56 |
| Small Equipment | (10,721.58) | 966.64 | 10,468.37 | 11,599.68 |
| Legal & Accounting | 40,515.73 | 7,662.48 | 138,765.46 | 91,949.76 |
| Help Wanted Ads | | 868.75 | 197.00 | 10,425.00 |
| Publicity & Advertising | 9,661.27 | 8,329.14 | 123,309.60 | 99,949.68 |
| Travel | 15,951.90 | 18,175.20 | 226,545.01 | 218,102.40 |
| Licenses, Dues, Subscriptions | 2,496.69 | 3,703.31 | 44,295.47 | 44,439.72 |
| Office Supplies | 2,075.31 | 1,341.64 | 15,926.35 | 16,099.68 |
| Postage | 902.91 | 656.16 | 7,643.74 | 7,873.92 |
| Conferences & Inservices | 249.18 | 2,111.32 | 14,210.11 | 25,335.84 |
| Training Resources | 3,524.50 | 2,265.81 | 30,633.98 | 27,189.72 |
| Background Checks | 852.50 | 608.32 | 8,738.35 | 7,299.84 |
| Activity Supplies | (7,185.42) | 2,426.81 | 19,557.21 | 29,121.72 |
| Recreational | | | 75.64 | |
| Grant Expenses | | | 1,930.00 | |
| Behavior | (7,301.28) | 666.66 | 27,404.58 | 7,999.92 |
| Pharmacist | 617.59 | 1,377.23 | 14,178.39 | 16,526.76 |
| Day Service | 22,639.96 | 20,118.57 | 266,386.97 | 241,422.84 |
| Property Taxes | | 166.66 | | 1,999.92 |
| Non-reimbursable Expense | 5,366.82 | | 5,366.82 | |
| Bad Debt Expense | (1,367.40) | | (1,367.40) | |
| Loss on Disposal of Assets | 7,809.43 | | 8,321.01 | |
| Fees - Endowment Fund | 2,599.05 | 466.66 | 12,811.61 | 5,599.92 |
| Donation Expense | <u>793.01</u> | | <u>793.01</u> | |
| Total Other Variable Expenses | 180,482.13 | 134,281.30 | 1,886,463.37 | 1,611,375.60 |
| Total Variable Expenses | 836,616.96 | 929,645.78 | 10,530,901.43 | 11,155,749.36 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 30,575.47 | 27,607.13 | 333,781.97 | 331,285.56 |
| Utilities | 4,974.71 | 4,896.87 | 59,428.21 | 58,762.44 |
| Telephone | 9,261.14 | 4,449.37 | 64,082.78 | 53,392.44 |
| Office Lease | 720.00 | 720.00 | 8,640.00 | 8,640.00 |
| Van Lease | 1,149.03 | 2,070.24 | 38,963.43 | 24,842.88 |
| Copier Lease | 1,133.07 | 1,350.00 | 15,184.76 | 16,200.00 |
| Insurance | 14,422.63 | 15,245.24 | 173,871.13 | 182,942.88 |
| Provider Assessment | 13,916.50 | 13,426.74 | 165,528.54 | 161,120.88 |
| Interest | <u>6,348.22</u> | <u>6,591.27</u> | <u>78,121.12</u> | <u>79,095.24</u> |
| Total Fixed Expenses | 82,500.77 | 76,356.86 | 937,601.94 | 916,282.32 |
| Total Expenses Before Allocations | 919,117.73 | 1,006,002.64 | 11,468,503.37 | 12,072,031.68 |
| Net Income (Loss) Before Allocati | (57,181.02) | (17,078.10) | 628,387.32 | (204,937.20) |
| Allocations | | | | |

LifeDesigns, Inc.
Total Agency
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-----------------------------|-----------------------------|----------------------------|------------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Net Income (Loss) After Allocation | <u>(\$57,181.02)</u> | <u>(\$17,078.10)</u> | <u>\$628,387.32</u> | <u>(\$204,937.20)</u> |
| Net Income | <u>(57,181.02)</u> | <u>(17,078.10)</u> | <u>628,387.32</u> | <u>(204,937.20)</u> |
| Total Overtime | 102,795.11 | 82,250.96 | 1,030,026.22 | 987,011.52 |

LifeDesigns, Inc.
Operations Cost Center 000
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|--|-------------------|-------------------|---------------------|---------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Rental Income | \$2,800.00 | \$2,775.00 | \$33,300.00 | \$33,300.00 |
| Total Service Revenue | 2,800.00 | 2,775.00 | 33,300.00 | 33,300.00 |
| Other Revenue: | | | | |
| Grant Revenue | | | 28,843.23 | |
| County Funding | 14,996.81 | 14,420.00 | 179,961.50 | 173,040.00 |
| Donations | | | 139.15 | |
| Interest Income | 25,040.34 | | 25,416.67 | |
| Misc Income | 8.00 | | 9,437.09 | |
| Total Other Revenue | 40,045.15 | 14,420.00 | 243,797.64 | 173,040.00 |
| Total Revenue | 42,845.15 | 17,195.00 | 277,097.64 | 206,340.00 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Operations Salaries | 40,373.47 | 39,337.49 | 464,318.21 | 472,049.88 |
| Executive Salaries | 8,500.17 | 8,416.66 | 100,269.56 | 100,999.92 |
| AA/Typist | 6,228.57 | 6,144.50 | 72,517.31 | 73,734.00 |
| Network Coordinator & EDC | 3,385.92 | 3,293.00 | 40,312.15 | 39,516.00 |
| Maintenance Salaries | 3,051.56 | 3,021.66 | 36,717.46 | 36,259.92 |
| Accrued PTO | 28,796.69 | | 21,699.61 | |
| DSP Bonus | 64.00 | | 28,858.45 | |
| Total Salaries | 90,400.38 | 60,213.31 | 764,692.75 | 722,559.72 |
| Benefits: | | | | |
| FICA | 6,537.52 | 4,606.41 | 53,426.41 | 55,276.92 |
| Pension Contribution | 3,658.68 | 1,231.66 | 17,132.51 | 14,779.92 |
| Unemployment Payout | 65.49 | | 340.90 | |
| Other Benefits | 11,816.17 | 10,606.66 | 145,822.26 | 127,279.92 |
| Employee Appreciation | (2,533.17) | 833.33 | 7,766.08 | 9,999.96 |
| Total Benefits | 19,544.69 | 17,278.06 | 224,488.16 | 207,336.72 |
| Other Variable Expenses | | | | |
| Independent Contractor | 10,981.58 | 6,282.33 | 89,001.14 | 75,387.96 |
| Food | 38.85 | 125.00 | 984.18 | 1,500.00 |
| Housekeeping | 837.14 | 1,005.00 | 10,851.17 | 12,060.00 |
| Other Operations | 4,501.75 | 500.00 | 9,061.77 | 6,000.00 |
| Repairs & Maintenance | 2,299.27 | 1,233.33 | 21,096.23 | 14,799.96 |
| Small Equipment | (6,784.32) | 690.83 | 8,611.27 | 8,289.96 |
| Legal & Accounting | 38,766.73 | 5,851.66 | 116,943.55 | 70,219.92 |
| Publicity & Advertising | 50.00 | 416.66 | 8,270.33 | 4,999.92 |
| Travel | 395.10 | 833.33 | 9,741.12 | 9,999.96 |
| Licenses, Dues, Subscriptions | 3,208.48 | 3,416.66 | 38,608.21 | 40,999.92 |
| Office Supplies | 1,775.87 | 833.33 | 11,602.77 | 9,999.96 |
| Postage | 902.91 | 583.33 | 7,269.24 | 6,999.96 |
| Conferences & Inservices | 249.18 | 508.33 | 11,636.31 | 6,099.96 |
| Training Resources | 624.00 | 1,890.83 | 14,824.51 | 22,689.96 |
| Background Checks | 63.00 | 83.33 | 1,287.80 | 999.96 |
| Activity Supplies | (2,479.65) | | | |
| Property Taxes | | 166.66 | | 1,999.92 |
| Loss on Disposal of Assets | 49.56 | | 49.56 | |
| Fees - Endowment Fund | 2,599.05 | 466.66 | 12,811.61 | 5,599.92 |
| Total Other Variable Expenses | 58,078.50 | 24,887.27 | 372,650.77 | 298,647.24 |
| Total Variable Expenses | 168,023.57 | 102,378.64 | 1,361,831.68 | 1,228,543.68 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 9,786.38 | 8,421.82 | 100,210.41 | 101,061.84 |
| Utilities | 1,097.14 | 1,083.33 | 13,720.79 | 12,999.96 |
| Telephone | 2,949.15 | 252.08 | 9,903.81 | 3,024.96 |
| Van Lease | 287.25 | | 10,239.05 | |
| Copier Lease | 1,133.07 | 1,350.00 | 15,184.76 | 16,200.00 |
| Insurance | 2,731.40 | 4,193.74 | 48,966.92 | 50,324.88 |
| Interest | 4,118.81 | 4,231.24 | 50,162.36 | 50,774.88 |
| Total Fixed Expenses | 22,103.20 | 19,532.21 | 248,388.10 | 234,386.52 |
| Total Expenses Before Allocations | 190,126.77 | 121,910.85 | 1,610,219.78 | 1,462,930.20 |

LifeDesigns, Inc.
 Operations Cost Center 000
 For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|------------------------------|-----------------------------|------------------------------|------------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Net Income (Loss) Before Allocati | (\$147,281.62) | (\$104,715.85) | (\$1,333,122.14) | (\$1,256,590.20) |
| Allocations | | | | |
| Services & Operations | <u>1,185,841.00</u> | <u> </u> | <u> </u> | <u> </u> |
| Total Allocations | 1,185,841.00 | | | |
| Net Income (Loss) After Allocation | (1,333,122.62) | (104,715.85) | (1,333,122.14) | (1,256,590.20) |
| Net Income | <u>(1,333,122.62)</u> | <u>(104,715.85)</u> | <u>(1,333,122.14)</u> | <u>(1,256,590.20)</u> |

LifeDesigns, Inc.
Columbus Office
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|------------------|-----------------|---------------------|------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Other Revenue: | | | | |
| Donations | \$2,087.00 | \$1,250.00 | \$25,200.00 | \$15,000.00 |
| Total Other Revenue | 2,087.00 | 1,250.00 | 25,200.00 | 15,000.00 |
| Total Revenue | 2,087.00 | 1,250.00 | 25,200.00 | 15,000.00 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Benefits: | | | | |
| Other Variable Expenses | | | | |
| Repairs & Maintenance | | 8.33 | | 99.96 |
| Office Supplies | | 16.66 | | 199.92 |
| Total Other Variable Expenses | | 24.99 | | 299.88 |
| Total Variable Expenses | | 24.99 | | 299.88 |
| Fixed Expenses: | | | | |
| Telephone | 72.00 | 70.83 | 864.00 | 849.96 |
| Office Lease | 720.00 | 720.00 | 8,640.00 | 8,640.00 |
| Insurance | 42.15 | 29.00 | 505.80 | 348.00 |
| Total Fixed Expenses | 834.15 | 819.83 | 10,009.80 | 9,837.96 |
| Total Expenses Before Allocations | 834.15 | 844.82 | 10,009.80 | 10,137.84 |
| Net Income (Loss) Before Allocati | 1,252.85 | 405.18 | 15,190.20 | 4,862.16 |
| Allocations | | | | |
| Services & Operations | (13,937.00) | | | |
| Total Allocations | (13,937.00) | | | |
| Net Income (Loss) After Allocation | 15,189.85 | 405.18 | 15,190.20 | 4,862.16 |
| Net Income | 15,189.85 | 405.18 | 15,190.20 | 4,862.16 |

LifeDesigns, Inc.
Development Cost Center 002
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|--------------------------|--------------------------|--------------------------|---------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Other Revenue: | | | | |
| Grant Revenue | | | \$242,000.00 | |
| Donations | 1,365.39 | 1,416.66 | 41,353.57 | 16,999.92 |
| Unrealized Gain on Endowment Fund | (80,199.48) | | (35,357.56) | |
| Dividend Income | <u>5,835.23</u> | <u>333.33</u> | <u>16,406.21</u> | <u>3,999.96</u> |
| Total Other Revenue | (72,998.86) | 1,749.99 | 264,402.22 | 20,999.88 |
| Total Revenue | (72,998.86) | 1,749.99 | 264,402.22 | 20,999.88 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Executive Salaries | 6,316.28 | 4,166.66 | 73,571.05 | 49,999.92 |
| Accrued PTO | (815.16) | | (97.62) | |
| Total Salaries | 5,501.12 | 4,166.66 | 73,473.43 | 49,999.92 |
| Benefits: | | | | |
| FICA | 253.31 | 333.33 | 4,284.35 | 3,999.96 |
| Pension Contribution | <u>317.70</u> | <u>118.75</u> | <u>1,279.21</u> | <u>1,425.00</u> |
| Total Benefits | 571.01 | 452.08 | 5,563.56 | 5,424.96 |
| Other Variable Expenses | | | | |
| Independent Contractor | | 500.00 | 4,231.45 | 6,000.00 |
| Help Wanted Ads | | | 197.00 | |
| Publicity & Advertising | 1,478.81 | 2,500.00 | 22,763.09 | 30,000.00 |
| Travel | | 33.33 | 10.00 | 399.96 |
| Licenses, Dues, Subscriptions | | | 1,923.72 | |
| Office Supplies | | 208.33 | 707.33 | 2,499.96 |
| Postage | | 70.83 | 374.50 | 849.96 |
| Conferences & Inservices | | 50.00 | 86.75 | 600.00 |
| Background Checks | | 25.00 | 25.00 | 300.00 |
| Grant Expenses | | | 1,930.00 | |
| Donation Expense | <u>793.01</u> | | <u>793.01</u> | |
| Total Other Variable Expenses | 2,271.82 | 3,387.49 | 33,041.85 | 40,649.88 |
| Total Variable Expenses | 8,343.95 | 8,006.23 | 112,078.84 | 96,074.76 |
| Fixed Expenses: | | | | |
| Telephone | 189.75 | 25.00 | 2,270.05 | 300.00 |
| Insurance | <u>481.86</u> | <u>65.58</u> | <u>1,137.54</u> | <u>786.96</u> |
| Total Fixed Expenses | 671.61 | 90.58 | 3,407.59 | 1,086.96 |
| Total Expenses Before Allocations | 9,015.56 | 8,096.81 | 115,486.43 | 97,161.72 |
| Net Income (Loss) Before Allocati | (82,014.42) | (6,346.82) | 148,915.79 | (76,161.84) |
| Allocations | | | | |
| Services & Operations | (230,930.00) | | | |
| Total Allocations | (230,930.00) | | | |
| Net Income (Loss) After Allocation | 148,915.58 | (6,346.82) | 148,915.79 | (76,161.84) |
| Net Income | <u>148,915.58</u> | <u>(6,346.82)</u> | <u>148,915.79</u> | <u>(76,161.84)</u> |

LifeDesigns, Inc.
 Week of Chocolate Cost Ctr 449
 For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|------------------------|------------------------|-------------------------|-------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Other Revenue: | | | | |
| Fundraising | <u>\$7,700.00</u> | <u>\$5,833.33</u> | <u>\$56,778.26</u> | <u>\$69,999.96</u> |
| Total Other Revenue | <u>7,700.00</u> | <u>5,833.33</u> | <u>56,778.26</u> | <u>69,999.96</u> |
| Total Revenue | <u>7,700.00</u> | <u>5,833.33</u> | <u>56,778.26</u> | <u>69,999.96</u> |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Benefits: | | | | |
| Other Variable Expenses | | | | |
| Publicity & Advertising | <u>8,008.50</u> | <u>2,500.00</u> | <u>47,326.17</u> | <u>30,000.00</u> |
| Total Other Variable Expenses | <u>8,008.50</u> | <u>2,500.00</u> | <u>47,326.17</u> | <u>30,000.00</u> |
| Total Variable Expenses | <u>8,008.50</u> | <u>2,500.00</u> | <u>47,326.17</u> | <u>30,000.00</u> |
| Fixed Expenses: | | | | |
| Total Expenses Before Allocations | <u>8,008.50</u> | <u>2,500.00</u> | <u>47,326.17</u> | <u>30,000.00</u> |
| Net Income (Loss) Before Allocati | <u>(308.50)</u> | <u>3,333.33</u> | <u>9,452.09</u> | <u>39,999.96</u> |
| Allocations | | | | |
| Services & Operations | <u>(9,761.00)</u> | | | |
| Total Allocations | <u>(9,761.00)</u> | | | |
| Net Income (Loss) After Allocation | <u>9,452.50</u> | <u>3,333.33</u> | <u>9,452.09</u> | <u>39,999.96</u> |
| Net Income | <u>9,452.50</u> | <u>3,333.33</u> | <u>9,452.09</u> | <u>39,999.96</u> |

LifeDesigns, Inc.
Highland Apts 456
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-------------------|-------------------|---------------------|--------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Rental Income | \$2,177.28 | \$2,280.83 | \$29,402.58 | \$27,369.96 |
| Total Service Revenue | 2,177.28 | 2,280.83 | 29,402.58 | 27,369.96 |
| Other Revenue: | | | | |
| Misc Income | 25.00 | 31.25 | 44.98 | 375.00 |
| Total Other Revenue | 25.00 | 31.25 | 44.98 | 375.00 |
| Total Revenue | 2,202.28 | 2,312.08 | 29,447.56 | 27,744.96 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| AA/Typist | 197.92 | 194.08 | 2,334.85 | 2,328.96 |
| Total Salaries | 197.92 | 194.08 | 2,334.85 | 2,328.96 |
| Benefits: | | | | |
| FICA | 14.21 | 14.83 | 172.43 | 177.96 |
| Total Benefits | 14.21 | 14.83 | 172.43 | 177.96 |
| Other Variable Expenses | | | | |
| Independent Contractor | 185.79 | 241.33 | 1,994.29 | 2,895.96 |
| Repairs & Maintenance | 268.24 | 333.33 | 4,134.50 | 3,999.96 |
| Publicity & Advertising | | 2.08 | | 24.96 |
| Licenses, Dues, Subscriptions | | 16.00 | 630.76 | 192.00 |
| Total Other Variable Expenses | 454.03 | 592.74 | 6,759.55 | 7,112.88 |
| Total Variable Expenses | 666.16 | 801.65 | 9,266.83 | 9,619.80 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 2,340.50 | 2,406.74 | 28,190.00 | 28,880.88 |
| Utilities | | 16.66 | | 199.92 |
| Insurance | 91.03 | 82.91 | 1,071.43 | 994.92 |
| Interest | 312.20 | 264.08 | 3,623.16 | 3,168.96 |
| Total Fixed Expenses | 2,743.73 | 2,770.39 | 32,884.59 | 33,244.68 |
| Total Expenses Before Allocations | 3,409.89 | 3,572.04 | 42,151.42 | 42,864.48 |
| Net Income (Loss) Before Allocati | (1,207.61) | (1,259.96) | (12,703.86) | (15,119.52) |
| Allocations | | | | |
| Services & Operations | (8,235.60) | | | |
| Total Allocations | (8,235.60) | | | |
| Net Income (Loss) After Allocation | 7,027.99 | (1,259.96) | (12,703.86) | (15,119.52) |
| Net Income | 7,027.99 | (1,259.96) | (12,703.86) | (15,119.52) |

LifeDesigns, Inc.
Covey Lane Cost Center 455
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-------------------|-------------------|---------------------|--------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Rental Income | \$5,994.00 | \$7,155.75 | \$78,347.00 | \$85,869.00 |
| Total Service Revenue | 5,994.00 | 7,155.75 | 78,347.00 | 85,869.00 |
| Other Revenue: | | | | |
| Misc Income | 25.00 | | (841.90) | |
| Total Other Revenue | 25.00 | | (841.90) | |
| Total Revenue | 6,019.00 | 7,155.75 | 77,505.10 | 85,869.00 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| AA/Typist | 593.78 | 582.16 | 7,004.51 | 6,985.92 |
| Total Salaries | 593.78 | 582.16 | 7,004.51 | 6,985.92 |
| Benefits: | | | | |
| FICA | 42.65 | 44.50 | 517.53 | 534.00 |
| Total Benefits | 42.65 | 44.50 | 517.53 | 534.00 |
| Other Variable Expenses | | | | |
| Independent Contractor | 614.54 | 928.08 | 6,530.05 | 11,136.96 |
| Other Operations | 760.08 | | 760.08 | |
| Repairs & Maintenance | 470.39 | 1,250.00 | 14,577.12 | 15,000.00 |
| Legal & Accounting | | 41.66 | | 499.92 |
| Licenses, Dues, Subscriptions | | 29.00 | 1,931.75 | 348.00 |
| Office Supplies | | 2.08 | | 24.96 |
| Postage | | 2.00 | | 24.00 |
| Conferences & Inservices | | 25.00 | | 300.00 |
| Bad Debt Expense | 115.00 | | 115.00 | |
| Loss on Disposal of Assets | 351.47 | | 351.47 | |
| Total Other Variable Expenses | 2,311.48 | 2,277.82 | 24,265.47 | 27,333.84 |
| Total Variable Expenses | 2,947.91 | 2,904.48 | 31,787.51 | 34,853.76 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 4,687.86 | 4,547.99 | 55,813.12 | 54,575.88 |
| Utilities | 102.69 | 100.00 | 1,127.81 | 1,200.00 |
| Insurance | 253.77 | 291.49 | 2,982.45 | 3,497.88 |
| Interest | 375.59 | 544.16 | 4,994.25 | 6,529.92 |
| Total Fixed Expenses | 5,419.91 | 5,483.64 | 64,917.63 | 65,803.68 |
| Total Expenses Before Allocations | 8,367.82 | 8,388.12 | 96,705.14 | 100,657.44 |
| Net Income (Loss) Before Allocati | (2,348.82) | (1,232.37) | (19,200.04) | (14,788.44) |
| Allocations | | | | |
| Services & Operations | (18,778.28) | | | |
| Total Allocations | (18,778.28) | | | |
| Net Income (Loss) After Allocation | 16,429.46 | (1,232.37) | (19,200.04) | (14,788.44) |
| Net Income | 16,429.46 | (1,232.37) | (19,200.04) | (14,788.44) |

LifeDesigns, Inc.
Orris House Cost Center 130
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-----------------|-----------------|---------------------|-------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Rental Income | \$710.00 | \$610.00 | \$7,426.00 | \$7,320.00 |
| Total Service Revenue | 710.00 | 610.00 | 7,426.00 | 7,320.00 |
| Other Revenue: | | | | |
| Total Revenue | 710.00 | 610.00 | 7,426.00 | 7,320.00 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| AA/Typist | 39.58 | 38.83 | 466.95 | 465.96 |
| Total Salaries | 39.58 | 38.83 | 466.95 | 465.96 |
| Benefits: | | | | |
| FICA | 2.84 | 3.00 | 34.44 | 36.00 |
| Total Benefits | 2.84 | 3.00 | 34.44 | 36.00 |
| Other Variable Expenses | | | | |
| Independent Contractor | 50.37 | 60.33 | 691.41 | 723.96 |
| Other Operations | | 5.50 | | 66.00 |
| Repairs & Maintenance | | 208.33 | 2,057.64 | 2,499.96 |
| Licenses, Dues, Subscriptions | | | 66.50 | |
| Total Other Variable Expenses | 50.37 | 274.16 | 2,815.55 | 3,289.92 |
| Total Variable Expenses | 92.79 | 315.99 | 3,316.94 | 3,791.88 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 529.11 | 572.65 | 6,235.85 | 6,871.80 |
| Telephone | | 0.66 | | 7.92 |
| Insurance | 56.87 | 42.16 | 678.11 | 505.92 |
| Total Fixed Expenses | 585.98 | 615.47 | 6,913.96 | 7,385.64 |
| Total Expenses Before Allocations | 678.77 | 931.46 | 10,230.90 | 11,177.52 |
| Net Income (Loss) Before Allocati | 31.23 | (321.46) | (2,804.90) | (3,857.52) |
| Allocations | | | | |
| Services & Operations | (2,030.52) | | | |
| Total Allocations | (2,030.52) | | | |
| Net Income (Loss) After Allocation | 2,061.75 | (321.46) | (2,804.90) | (3,857.52) |
| Net Income | 2,061.75 | (321.46) | (2,804.90) | (3,857.52) |

LifeDesigns, Inc.
Rhinestone Rental 133
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|------------------|-----------------|---------------------|-------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Rental Income | \$1,350.00 | \$1,800.00 | \$14,472.58 | \$21,600.00 |
| Total Service Revenue | 1,350.00 | 1,800.00 | 14,472.58 | 21,600.00 |
| Other Revenue: | | | | |
| Total Revenue | 1,350.00 | 1,800.00 | 14,472.58 | 21,600.00 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Benefits: | | | | |
| Other Variable Expenses | | | | |
| Repairs & Maintenance | (887.44) | 333.33 | 6,573.97 | 3,999.96 |
| Small Equipment | (683.05) | 25.00 | 79.99 | 300.00 |
| Activity Supplies | 148.04 | 125.00 | 1,626.28 | 1,500.00 |
| Loss on Disposal of Assets | 1,892.68 | | 1,933.12 | |
| Total Other Variable Expenses | 470.23 | 483.33 | 10,213.36 | 5,799.96 |
| Total Variable Expenses | 470.23 | 483.33 | 10,213.36 | 5,799.96 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 926.86 | 801.58 | 10,540.88 | 9,618.96 |
| Utilities | 422.61 | 416.66 | 5,092.27 | 4,999.92 |
| Telephone | 150.34 | 122.00 | 2,237.69 | 1,464.00 |
| Insurance | 85.49 | 73.75 | 1,025.88 | 885.00 |
| Interest | 194.19 | 199.58 | 2,377.33 | 2,394.96 |
| Total Fixed Expenses | 1,779.49 | 1,613.57 | 21,274.05 | 19,362.84 |
| Total Expenses Before Allocations | 2,249.72 | 2,096.90 | 31,487.41 | 25,162.80 |
| Net Income (Loss) Before Allocati | (899.72) | (296.90) | (17,014.83) | (3,562.80) |
| Allocations | | | | |
| Services & Operations | (20,744.18) | | | |
| Total Allocations | (20,744.18) | | | |
| Net Income (Loss) After Allocation | 19,844.46 | (296.90) | (17,014.83) | (3,562.80) |
| Net Income | 19,844.46 | (296.90) | (17,014.83) | (3,562.80) |

LifeDesigns, Inc.
SLS Admin Cost Center 20-200
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|---------------------|---------------------|-----------------------|-----------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Prior Year & Rate Adjustments | (\$622.00) | | (\$622.00) | |
| Total Service Revenue | (622.00) | | (622.00) | |
| Other Revenue: | | | | |
| Donations | | | 62.50 | |
| Misc Income | 70.00 | | 89,777.29 | |
| Total Other Revenue | 70.00 | | 89,839.79 | |
| Total Revenue | (552.00) | | 89,217.79 | |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| AA/Typist | 1,932.22 | 2,184.75 | 24,515.04 | 26,217.00 |
| Network Managers | 63,229.55 | 62,822.75 | 780,524.04 | 753,873.00 |
| Network Coordinator & EDC | 13,471.26 | 20,761.58 | 225,765.56 | 249,138.96 |
| DSP Salaries | 16,532.85 | | 164,025.71 | |
| Training Salaries | 8,339.79 | 14,227.50 | 124,638.30 | 170,730.00 |
| DOS | 8,879.82 | 8,927.50 | 87,191.14 | 107,130.00 |
| Quality Assurance Coord | 1,613.30 | | 7,995.33 | |
| RN Salaries | 6,251.94 | 8,333.33 | 68,304.29 | 99,999.96 |
| Accrued PTO | (52,095.18) | 7,837.50 | (1,934.43) | 94,050.00 |
| DSP Bonus | | 9,166.66 | 111,296.08 | 109,999.92 |
| Total Salaries | 68,155.55 | 134,261.57 | 1,592,321.06 | 1,611,138.84 |
| Benefits: | | | | |
| FICA | 4,887.12 | 8,583.33 | 117,237.63 | 102,999.96 |
| Pension Contribution | 5,285.09 | 2,065.00 | 22,861.87 | 24,780.00 |
| Unemployment Payout | | 445.25 | 5,167.31 | 5,343.00 |
| Other Benefits | 58,753.20 | 68,795.83 | 696,793.71 | 825,549.96 |
| Employee Appreciation | | 83.33 | 330.95 | 999.96 |
| Total Benefits | 68,925.41 | 79,972.74 | 842,391.47 | 959,672.88 |
| Other Variable Expenses | | | | |
| Independent Contractor | 919.33 | 833.33 | 11,186.29 | 9,999.96 |
| Nursing & Other Nursing | | 16.66 | | 199.92 |
| Customer Reimbursable Expenses | 119.04 | | 791.70 | |
| Other Operations | 204.25 | | 1,521.93 | |
| Repairs & Maintenance | 1,281.43 | 1,250.00 | 5,336.35 | 15,000.00 |
| Small Equipment | (550.00) | 166.66 | 293.73 | 1,999.92 |
| Legal & Accounting | 1,194.78 | 539.16 | 7,165.91 | 6,469.92 |
| Publicity & Advertising | 61.98 | 2,643.75 | 34,740.32 | 31,725.00 |
| Travel | 3,500.21 | 2,833.33 | 39,560.31 | 33,999.96 |
| Licenses, Dues, Subscriptions | | 125.00 | 778.00 | 1,500.00 |
| Office Supplies | 55.98 | 83.33 | 1,223.91 | 999.96 |
| Conferences & Inservices | | 250.00 | 98.05 | 3,000.00 |
| Training Resources | 2,844.50 | 291.66 | 14,799.97 | 3,499.92 |
| Background Checks | 656.00 | 416.66 | 6,081.95 | 4,999.92 |
| Pharmacist | 6.00 | 468.91 | 5,002.56 | 5,626.92 |
| Bad Debt Expense | (582.40) | | (582.40) | |
| Loss on Disposal of Assets | 119.07 | | 119.07 | |
| Total Other Variable Expenses | 9,830.17 | 9,918.45 | 128,117.65 | 119,021.40 |
| Total Variable Expenses | 146,911.13 | 224,152.76 | 2,562,830.18 | 2,689,833.12 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 1,463.68 | 1,673.16 | 16,656.33 | 20,077.92 |
| Telephone | 1,823.36 | 1,766.66 | 22,866.41 | 21,199.92 |
| Van Lease | | 538.83 | 5,086.31 | 6,465.96 |
| Insurance | 8,999.67 | 7,570.41 | 84,513.28 | 90,844.92 |
| Interest | 13.55 | 19.66 | 236.67 | 235.92 |
| Total Fixed Expenses | 12,300.26 | 11,568.72 | 129,359.00 | 138,824.64 |
| Total Expenses Before Allocations | 159,211.39 | 235,721.48 | 2,692,189.18 | 2,828,657.76 |
| Net Income (Loss) Before Allocations | (159,763.39) | (235,721.48) | (2,602,971.39) | (2,828,657.76) |
| Allocations | | | | |

LifeDesigns, Inc.
SLS Admin Cost Center 20-200
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|------------------------------|----------------------------|------------------------------|------------------------------|
| | Actual | Budget | Actual | Budget |
| Services & Operations | \$2,443,208.00 | | | |
| Total Allocations | 2,443,208.00 | | | |
| Net Income (Loss) After Allocation | (2,602,971.39) | (235,721.48) | (2,602,971.39) | (2,828,657.76) |
| Net Income | <u>(2,602,971.39)</u> | <u>(235,721.48)</u> | <u>(2,602,971.39)</u> | <u>(2,828,657.76)</u> |

LifeDesigns, Inc.
Supported Living Program
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|---------------------|-------------------|---------------------|---------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Private Pay | \$323.47 | \$618.83 | \$8,069.77 | \$7,425.96 |
| RH10 | 6,609.42 | 8,955.25 | 92,471.97 | 107,463.00 |
| RH20 | 216,933.36 | 168,689.33 | 2,398,917.35 | 2,024,271.96 |
| Trip Revenue | 8,684.77 | 10,287.16 | 124,531.00 | 123,445.92 |
| PAC | 10,211.40 | 13,433.75 | 136,322.80 | 161,205.00 |
| Daily Rate Revenue | 258,987.59 | 359,649.00 | 3,678,674.04 | 4,315,788.00 |
| ATTC | 3,153.24 | 3,184.00 | 43,736.57 | 38,208.00 |
| Health Care Coordination/Wellness | 5,078.13 | 5,097.41 | 68,611.44 | 61,168.92 |
| CHIO | 17,308.06 | 19,553.33 | 216,506.19 | 234,639.96 |
| CHGO | 1,880.13 | | 34,540.93 | |
| AFC3 | 3,086.10 | 3,086.08 | 37,547.55 | 37,032.96 |
| AF01 | 1,193.01 | 1,482.58 | 17,376.45 | 17,790.96 |
| Total Service Revenue | 533,448.68 | 594,036.72 | 6,857,306.06 | 7,128,440.64 |
| Other Revenue: | | | | |
| Total Revenue | 533,448.68 | 594,036.72 | 6,857,306.06 | 7,128,440.64 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| DSP Private Pay | 174.73 | | 2,317.78 | |
| DSP OT Private Pay | 27.74 | | 27.74 | |
| DSP RH10 | 2,907.57 | 3,575.00 | 28,459.07 | 42,900.00 |
| DSP OT RH10 | 416.49 | 422.66 | 6,418.00 | 5,071.92 |
| DSP RH20 | 77,811.07 | 71,762.50 | 871,079.96 | 861,150.00 |
| DSP OT RH20 | 36,360.85 | 22,059.83 | 299,691.17 | 264,717.96 |
| DSP PAC | 3,767.65 | 5,780.66 | 49,753.09 | 69,367.92 |
| DSP OT PAC | 1,036.28 | 629.33 | 9,875.61 | 7,551.96 |
| DSP Daily Rate | 71,610.33 | 133,881.00 | 1,159,647.34 | 1,606,572.00 |
| DSP OT Daily Rate | 36,801.98 | 41,155.83 | 458,470.44 | 493,869.96 |
| DSP ATTC | 1,862.55 | 2,246.66 | 25,931.18 | 26,959.92 |
| DSP OT ATTC | 178.66 | | 370.74 | |
| DSP CHIO | 3,782.30 | 9,859.75 | 71,573.60 | 118,317.00 |
| DSP OT CHIO | 1,013.99 | 1,213.33 | 14,364.32 | 14,559.96 |
| DSP CHG Salaries: SLS Waiver | 799.89 | | 14,123.14 | |
| DSP OT CHG Salaries: SLS Waiver | 1,207.37 | | 7,962.41 | |
| Total Salaries | 239,759.45 | 292,586.55 | 3,020,065.59 | 3,511,038.60 |
| Benefits: | | | | |
| FICA | 17,624.11 | 22,382.75 | 222,665.32 | 268,593.00 |
| Total Benefits | 17,624.11 | 22,382.75 | 222,665.32 | 268,593.00 |
| Other Variable Expenses | | | | |
| Independent Contractor | 28,263.75 | 12,500.00 | 157,578.63 | 150,000.00 |
| Travel | 8,201.13 | 10,416.66 | 128,477.81 | 124,999.92 |
| Total Other Variable Expenses | 36,464.88 | 22,916.66 | 286,056.44 | 274,999.92 |
| Total Variable Expenses | 293,848.44 | 337,885.96 | 3,528,787.35 | 4,054,631.52 |
| Fixed Expenses: | | | | |
| Total Expenses Before Allocations | 293,848.44 | 337,885.96 | 3,528,787.35 | 4,054,631.52 |
| Net Income (Loss) Before Allocati | 239,600.24 | 256,150.76 | 3,328,518.71 | 3,073,809.12 |
| Allocations | | | | |
| Services & Operations | (2,295,170.18) | | | |
| Total Allocations | (2,295,170.18) | | | |
| Net Income (Loss) After Allocation | 2,534,770.42 | 256,150.76 | 3,328,518.71 | 3,073,809.12 |
| Net Income | 2,534,770.42 | 256,150.76 | 3,328,518.71 | 3,073,809.12 |

LifeDesigns, Inc.
Supported Living Program
For the Twelve Months Ending December 31, 2018

| | <i>December</i> | | <i>Year To Date</i> | |
|----------------|-----------------|---------------|---------------------|---------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Total Overtime | \$77,043.36 | \$65,480.98 | \$797,180.43 | \$785,771.76 |

LifeDesigns, Inc.
CEO Cost Center 450
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-------------------------|------------------------|-------------------------|-------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Private Pay | \$4,077.89 | \$5,033.33 | \$49,862.14 | \$60,399.96 |
| RH10 | | | 26.15 | |
| RH20 | 637.13 | 900.00 | 2,197.00 | 10,800.00 |
| Trip Revenue | | 1,024.58 | | 12,294.96 |
| Daily Rate Revenue | 98.87 | 158.33 | 2,919.42 | 1,899.96 |
| CHIO | 708.23 | 3,988.41 | 22,818.53 | 47,860.92 |
| CHGO | <u>4,015.52</u> | <u>6,959.75</u> | <u>71,132.14</u> | <u>83,517.00</u> |
| Total Service Revenue | 9,537.64 | 18,064.40 | 148,955.38 | 216,772.80 |
| Other Revenue: | | | | |
| Donations | | | 50.00 | |
| Fundraising | <u>1,000.00</u> | | <u>10,974.00</u> | |
| Total Other Revenue | 1,000.00 | | 11,024.00 | |
| Total Revenue | 10,537.64 | 18,064.40 | 159,979.38 | 216,772.80 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| DSP Salaries | 7,746.65 | 8,699.08 | 96,985.49 | 104,388.96 |
| Direct Service Staff Overtime | 101.57 | | 1,360.69 | |
| DSP RH10 | | | 12.45 | |
| DSP OT RH20 | 8.24 | | 144.55 | |
| DSP RH20 Emp/CEO | 267.28 | 75.00 | 2,191.70 | 900.00 |
| DSP CHIO | 537.02 | 1,441.66 | 11,360.87 | 17,299.92 |
| DSP OT CHIO | <u>42.67</u> | | <u>1,367.48</u> | |
| Total Salaries | 8,703.43 | 10,215.74 | 113,423.23 | 122,588.88 |
| Benefits: | | | | |
| FICA | <u>610.44</u> | <u>665.50</u> | <u>8,260.51</u> | <u>7,986.00</u> |
| Total Benefits | 610.44 | 665.50 | 8,260.51 | 7,986.00 |
| Other Variable Expenses | | | | |
| Repairs & Maintenance | 258.62 | 833.33 | 2,970.79 | 9,999.96 |
| Travel | 269.22 | 333.33 | 3,973.62 | 3,999.96 |
| Activity Supplies | <u>246.23</u> | <u>333.33</u> | <u>2,915.33</u> | <u>3,999.96</u> |
| Total Other Variable Expenses | 774.07 | 1,499.99 | 9,859.74 | 17,999.88 |
| Total Variable Expenses | 10,087.94 | 12,381.23 | 131,543.48 | 148,574.76 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 317.59 | 317.58 | 3,811.08 | 3,810.96 |
| Telephone | 240.34 | 46.75 | 911.42 | 561.00 |
| Interest | <u>13.55</u> | <u>45.83</u> | <u>236.65</u> | <u>549.96</u> |
| Total Fixed Expenses | 571.48 | 410.16 | 4,959.15 | 4,921.92 |
| Total Expenses Before Allocations | 10,659.42 | 12,791.39 | 136,502.63 | 153,496.68 |
| Net Income (Loss) Before Allocati | (121.78) | 5,273.01 | 23,476.75 | 63,276.12 |
| Allocations | | | | |
| Services & Operations | <u>(89,284.87)</u> | | | |
| Total Allocations | (89,284.87) | | | |
| Net Income (Loss) After Allocation | 89,163.09 | 5,273.01 | 23,476.75 | 63,276.12 |
| Net Income | <u>89,163.09</u> | <u>5,273.01</u> | <u>23,476.75</u> | <u>63,276.12</u> |

Total Overtime 152.48 2,872.72

LifeDesigns, Inc.
Respite Cost Center 319
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-------------------------|-------------------------|--------------------------|--------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Respite | <u>\$1,996.04</u> | <u>\$4,413.91</u> | <u>\$40,036.99</u> | <u>\$52,966.92</u> |
| Total Service Revenue | 1,996.04 | 4,413.91 | 40,036.99 | 52,966.92 |
| Other Revenue: | | | | |
| County Funding | <u>14,996.80</u> | <u>14,420.00</u> | <u>179,961.50</u> | <u>173,040.00</u> |
| Total Other Revenue | 14,996.80 | 14,420.00 | 179,961.50 | 173,040.00 |
| Total Revenue | 16,992.84 | 18,833.91 | 219,998.49 | 226,006.92 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| DSP RSPO | 747.64 | 1,482.91 | 11,067.88 | 17,794.92 |
| DSP OT RSPO | <u>140.04</u> | <u>627.00</u> | <u>3,207.63</u> | <u>7,524.00</u> |
| Total Salaries | 887.68 | 2,109.91 | 14,275.51 | 25,318.92 |
| Benefits: | | | | |
| FICA | <u>63.06</u> | <u>161.41</u> | <u>1,026.90</u> | <u>1,936.92</u> |
| Total Benefits | 63.06 | 161.41 | 1,026.90 | 1,936.92 |
| Other Variable Expenses | <u> </u> | <u> </u> | <u> </u> | <u> </u> |
| Total Variable Expenses | 950.74 | 2,271.32 | 15,302.41 | 27,255.84 |
| Fixed Expenses: | <u> </u> | <u> </u> | <u> </u> | <u> </u> |
| Total Expenses Before Allocations | 950.74 | 2,271.32 | 15,302.41 | 27,255.84 |
| Net Income (Loss) Before Allocati | 16,042.10 | 16,562.59 | 204,696.08 | 198,751.08 |
| Allocations | | | | |
| Services & Operations | <u>(10,182.66)</u> | <u> </u> | <u> </u> | <u> </u> |
| Total Allocations | (10,182.66) | | | |
| Net Income (Loss) After Allocation | 26,224.76 | 16,562.59 | 204,696.08 | 198,751.08 |
| Net Income | <u>26,224.76</u> | <u>16,562.59</u> | <u>204,696.08</u> | <u>198,751.08</u> |
| Total Overtime | 140.04 | 627.00 | 3,207.63 | 7,524.00 |

LifeDesigns, Inc.
Customer Fund Donations 433
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-----------------|---------------|---------------------|-----------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Other Revenue: | | | | |
| Donations | \$290.50 | \$335.16 | \$3,892.24 | \$4,021.92 |
| Total Other Revenue | 290.50 | 335.16 | 3,892.24 | 4,021.92 |
| Total Revenue | 290.50 | 335.16 | 3,892.24 | 4,021.92 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Benefits: | | | | |
| Other Variable Expenses | | | | |
| Activity Supplies | 39.00 | 335.16 | | 4,021.92 |
| Total Other Variable Expenses | 39.00 | 335.16 | | 4,021.92 |
| Total Variable Expenses | 39.00 | 335.16 | | 4,021.92 |
| Fixed Expenses: | | | | |
| Total Expenses Before Allocations | 39.00 | 335.16 | | 4,021.92 |
| Net Income (Loss) Before Allocati | 251.50 | | 3,892.24 | |
| Allocations | | | | |
| Net Income (Loss) After Allocation | 251.50 | | 3,892.24 | |
| Net Income | 251.50 | | 3,892.24 | |

LifeDesigns, Inc.
Employment 465
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-------------------|------------------|---------------------|-------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| RH20 | \$159.28 | | \$1,889.42 | |
| Daily Rate Revenue | | 2,916.66 | 466.86 | 34,999.92 |
| VR | 31,485.03 | 30,666.66 | 456,738.91 | 367,999.92 |
| Workplace Assistance | 110.76 | | 1,419.11 | |
| SF10 | 101.76 | 958.33 | 14,017.08 | 11,499.96 |
| Total Service Revenue | 31,856.83 | 34,541.65 | 474,531.38 | 414,499.80 |
| Other Revenue: | | | | |
| Grant Revenue | | 3,198.00 | 38,376.00 | 38,376.00 |
| Total Other Revenue | | 3,198.00 | 38,376.00 | 38,376.00 |
| Total Revenue | 31,856.83 | 37,739.65 | 512,907.38 | 452,875.80 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Network Managers | 15,499.41 | 17,692.08 | 188,564.58 | 212,304.96 |
| Network Coordinator & EDC | 6,110.22 | 3,949.50 | 61,785.94 | 47,394.00 |
| DSP Salaries | 160.50 | 3,500.00 | 4,274.28 | 42,000.00 |
| Direct Service Staff Overtime | 82.59 | | 3,326.12 | |
| DSP OT RH20 | 109.79 | | 341.48 | |
| DSP RH20 Emp/CEO | 38.78 | | 699.32 | |
| DSP Daily Rate | | | 145.06 | |
| DSP VR | 684.36 | 101.41 | 5,953.64 | 1,216.92 |
| DSP OT VR | 230.59 | | 1,725.13 | |
| Total Salaries | 22,916.24 | 25,242.99 | 266,815.55 | 302,915.88 |
| Benefits: | | | | |
| FICA | 1,686.07 | 1,655.58 | 20,317.86 | 19,866.96 |
| Total Benefits | 1,686.07 | 1,655.58 | 20,317.86 | 19,866.96 |
| Other Variable Expenses | | | | |
| Independent Contractor | 116.00 | 291.66 | 3,829.82 | 3,499.92 |
| Other Operations | 414.97 | 20.83 | 2,492.77 | 249.96 |
| Publicity & Advertising | | | 550.00 | |
| Travel | 875.32 | 541.66 | 10,316.56 | 6,499.92 |
| Office Supplies | 155.93 | 10.00 | 660.71 | 120.00 |
| Conferences & Inservices | | 1,236.33 | 2,070.00 | 14,835.96 |
| Total Other Variable Expenses | 1,562.22 | 2,100.48 | 19,919.86 | 25,205.76 |
| Total Variable Expenses | 26,164.53 | 28,999.05 | 307,053.27 | 347,988.60 |
| Fixed Expenses: | | | | |
| Telephone | | 100.00 | 1,814.44 | 1,200.00 |
| Total Fixed Expenses | | 100.00 | 1,814.44 | 1,200.00 |
| Total Expenses Before Allocations | 26,164.53 | 29,099.05 | 308,867.71 | 349,188.60 |
| Net Income (Loss) Before Allocati | 5,692.30 | 8,640.60 | 204,039.67 | 103,687.20 |
| Allocations | | | | |
| Services & Operations | (200,576.11) | | | |
| Total Allocations | (200,576.11) | | | |
| Net Income (Loss) After Allocation | 206,268.41 | 8,640.60 | 204,039.67 | 103,687.20 |
| Net Income | 206,268.41 | 8,640.60 | 204,039.67 | 103,687.20 |

Total Overtime 422.97 5,392.73

LifeDesigns, Inc.
Night Owl Security 466
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-------------------------|------------------------|-------------------------|-------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| EMS | \$15,972.86 | \$7,267.41 | \$78,812.17 | \$87,208.92 |
| Daily Rate Revenue | <u>4,218.80</u> | <u>10,805.83</u> | <u>71,862.04</u> | <u>129,669.96</u> |
| Total Service Revenue | 20,191.66 | 18,073.24 | 150,674.21 | 216,878.88 |
| Other Revenue: | | | | |
| Total Revenue | 20,191.66 | 18,073.24 | 150,674.21 | 216,878.88 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| DSP Salaries | <u>5,622.54</u> | <u>7,217.08</u> | <u>38,813.37</u> | <u>86,604.96</u> |
| Total Salaries | 5,622.54 | 7,217.08 | 38,813.37 | 86,604.96 |
| Benefits: | | | | |
| FICA | <u>419.79</u> | <u>552.08</u> | <u>2,896.46</u> | <u>6,624.96</u> |
| Total Benefits | 419.79 | 552.08 | 2,896.46 | 6,624.96 |
| Other Variable Expenses | | | | |
| Independent Contractor | 2,075.00 | 2,250.00 | 22,305.00 | 27,000.00 |
| Travel | <u>20.83</u> | <u>20.83</u> | <u>32.60</u> | <u>249.96</u> |
| Total Other Variable Expenses | 2,075.00 | 2,270.83 | 22,337.60 | 27,249.96 |
| Total Variable Expenses | 8,117.33 | 10,039.99 | 64,047.43 | 120,479.88 |
| Fixed Expenses: | | | | |
| Total Expenses Before Allocations | 8,117.33 | 10,039.99 | 64,047.43 | 120,479.88 |
| Net Income (Loss) Before Allocati | 12,074.33 | 8,033.25 | 86,626.78 | 96,399.00 |
| Allocations | | | | |
| Services & Operations | <u>(39,682.01)</u> | <u></u> | <u></u> | <u></u> |
| Total Allocations | (39,682.01) | | | |
| Net Income (Loss) After Allocation | 51,756.34 | 8,033.25 | 86,626.78 | 96,399.00 |
| Net Income | <u>51,756.34</u> | <u>8,033.25</u> | <u>86,626.78</u> | <u>96,399.00</u> |

LifeDesigns, Inc.
Behavior 467
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|--------------------|------------------|---------------------|-------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| BMGT | \$15,779.40 | \$21,250.00 | \$361,587.64 | \$255,000.00 |
| Total Service Revenue | 15,779.40 | 21,250.00 | 361,587.64 | 255,000.00 |
| Other Revenue: | | | | |
| Total Revenue | 15,779.40 | 21,250.00 | 361,587.64 | 255,000.00 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Behavior Salaries | | 2,100.83 | 5,914.12 | 25,209.96 |
| Total Salaries | | 2,100.83 | 5,914.12 | 25,209.96 |
| Benefits: | | | | |
| FICA | | 160.75 | 404.37 | 1,929.00 |
| Total Benefits | | 160.75 | 404.37 | 1,929.00 |
| Other Variable Expenses | | | | |
| Independent Contractor | 29,836.89 | 16,491.66 | 315,190.98 | 197,899.92 |
| Travel | | 100.00 | 468.00 | 1,200.00 |
| Total Other Variable Expenses | 29,836.89 | 16,591.66 | 315,658.98 | 199,099.92 |
| Total Variable Expenses | 29,836.89 | 18,853.24 | 321,977.47 | 226,238.88 |
| Fixed Expenses: | | | | |
| Total Expenses Before Allocations | 29,836.89 | 18,853.24 | 321,977.47 | 226,238.88 |
| Net Income (Loss) Before Allocati | (14,057.49) | 2,396.76 | 39,610.17 | 28,761.12 |
| Allocations | | | | |
| Services & Operations | (207,272.32) | | | |
| Total Allocations | (207,272.32) | | | |
| Net Income (Loss) After Allocation | 193,214.83 | 2,396.76 | 39,610.17 | 28,761.12 |
| Net Income | 193,214.83 | 2,396.76 | 39,610.17 | 28,761.12 |

LifeDesigns, Inc.
SGL Admin Cost Center 10-400
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|---------------------|--------------------|---------------------|---------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Other Revenue: | | | | |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| AA/Typist | \$1,932.12 | \$3,184.83 | \$24,514.61 | \$38,217.96 |
| Network Coordinator & EDC | 7,054.32 | 3,326.25 | 65,215.08 | 39,915.00 |
| DOS | 6,758.22 | 4,545.58 | 64,274.73 | 54,546.96 |
| Quality Assurance Coord | 1,613.30 | | 7,995.33 | |
| RN Salaries | 7,786.56 | 8,345.41 | 109,831.26 | 100,144.92 |
| Accrued PTO | (12,255.01) | | (3,103.61) | |
| DSP Bonus | 320.47 | | 1,382.86 | |
| Total Salaries | 13,209.98 | 19,402.07 | 270,110.26 | 232,824.84 |
| Benefits: | | | | |
| FICA | 878.81 | 1,484.25 | 20,060.82 | 17,811.00 |
| Pension Contribution | (746.47) | 287.75 | 659.63 | 3,453.00 |
| Other Benefits | 3,809.66 | 1,319.16 | 21,825.10 | 15,829.92 |
| Total Benefits | 3,942.00 | 3,091.16 | 42,545.55 | 37,093.92 |
| Other Variable Expenses | | | | |
| Other Operations | | | 300.00 | |
| Repairs & Maintenance | | 41.66 | | 499.92 |
| Legal & Accounting | 554.22 | 1,230.00 | 14,656.00 | 14,760.00 |
| Help Wanted Ads | | 868.75 | | 10,425.00 |
| Travel | 712.00 | 916.66 | 8,734.21 | 10,999.92 |
| Licenses, Dues, Subscriptions | | 33.33 | 266.00 | 399.96 |
| Conferences & Inservices | | 41.66 | 319.00 | 499.92 |
| Training Resources | | 41.66 | 137.50 | 499.92 |
| Background Checks | 133.50 | 83.33 | 1,343.60 | 999.96 |
| Bad Debt Expense | (900.00) | | (900.00) | |
| Total Other Variable Expenses | 499.72 | 3,257.05 | 24,856.31 | 39,084.60 |
| Total Variable Expenses | 17,651.70 | 25,750.28 | 337,512.12 | 309,003.36 |
| Fixed Expenses: | | | | |
| Telephone | 141.14 | 340.41 | 2,336.51 | 4,084.92 |
| Insurance | (438.53) | 514.16 | 4,236.73 | 6,169.92 |
| Total Fixed Expenses | (297.39) | 854.57 | 6,573.24 | 10,254.84 |
| Total Expenses Before Allocations | 17,354.31 | 26,604.85 | 344,085.36 | 319,258.20 |
| Net Income (Loss) Before Allocati | (17,354.31) | (26,604.85) | (344,085.36) | (319,258.20) |
| Allocations | | | | |
| Services & Operations | 326,731.00 | | | |
| Total Allocations | 326,731.00 | | | |
| Net Income (Loss) After Allocation | (344,085.31) | (26,604.85) | (344,085.36) | (319,258.20) |
| Net Income | (344,085.31) | (26,604.85) | (344,085.36) | (319,258.20) |

LifeDesigns, Inc.
Highland GH Cost Center 402
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|--|------------------|------------------|---------------------|-------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Group Home & Customer Liabilities | \$51,355.80 | \$50,030.41 | \$612,850.87 | \$600,364.92 |
| Total Service Revenue | 51,355.80 | 50,030.41 | 612,850.87 | 600,364.92 |
| Other Revenue: | | | | |
| Grant Revenue | | | 500.00 | |
| Total Other Revenue | | | 500.00 | |
| Total Revenue | 51,355.80 | 50,030.41 | 613,350.87 | 600,364.92 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Day Program Salaries | 1,034.45 | 1,473.16 | 17,307.28 | 17,677.92 |
| DSP Salaries | 7,219.24 | 9,513.66 | 85,608.94 | 114,163.92 |
| Group Home Mgr | 2,070.69 | 3,385.83 | 26,313.50 | 40,629.96 |
| Accrued PTO | (561.11) | 65.16 | (2,730.14) | 781.92 |
| Direct Service Staff Overtime | 5,409.14 | 4,276.66 | 46,460.49 | 51,319.92 |
| DSP Bonus | | | 1,110.08 | |
| Laundry Salaries | 34.58 | 604.91 | 1,139.24 | 7,258.92 |
| Total Salaries | 15,206.99 | 19,319.38 | 175,209.39 | 231,832.56 |
| Benefits: | | | | |
| FICA | 1,108.21 | 1,472.91 | 12,878.65 | 17,674.92 |
| Pension Contribution | (441.47) | 140.25 | (0.01) | 1,683.00 |
| Other Benefits | 1,330.40 | 2,059.33 | 24,657.55 | 24,711.96 |
| Total Benefits | 1,997.14 | 3,672.49 | 37,536.19 | 44,069.88 |
| Other Variable Expenses | | | | |
| Independent Contractor | (1,907.20) | 500.00 | 3,542.09 | 6,000.00 |
| Nursing & Other Nursing | 117.91 | 108.33 | 1,138.56 | 1,299.96 |
| Dietician | | 83.33 | 540.00 | 999.96 |
| Food | 1,723.57 | 1,600.00 | 21,015.10 | 19,200.00 |
| Laundry Supplies | 29.88 | 30.00 | 311.08 | 360.00 |
| Housekeeping | 81.16 | 300.00 | 1,840.82 | 3,600.00 |
| Other Operations | | | 434.71 | |
| Repairs & Maintenance | 532.76 | 750.00 | 6,101.45 | 9,000.00 |
| Small Equipment | | | 458.94 | |
| Publicity & Advertising | 12.39 | 66.66 | 1,873.45 | 799.92 |
| Travel | 359.60 | 400.25 | 4,483.95 | 4,803.00 |
| Licenses, Dues, Subscriptions | (711.79) | | 118.69 | |
| Office Supplies | 35.58 | 50.00 | 412.87 | 600.00 |
| Training Resources | | | 152.00 | |
| Activity Supplies | (175.22) | 300.00 | 2,716.85 | 3,600.00 |
| Behavior | 300.00 | | 4,582.41 | |
| Pharmacist | 50.38 | 108.33 | 1,552.57 | 1,299.96 |
| Day Service | 4,691.65 | 4,416.66 | 55,841.01 | 52,999.92 |
| Non-reimbursable Expense | 1,055.01 | | 1,055.01 | |
| Loss on Disposal of Assets | 1,660.77 | | 1,902.76 | |
| Total Other Variable Expenses | 7,856.45 | 8,713.56 | 110,074.32 | 104,562.72 |
| Total Variable Expenses | 25,060.58 | 31,705.43 | 322,819.90 | 380,465.16 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 3,995.86 | 2,453.49 | 32,264.31 | 29,441.88 |
| Utilities | 847.89 | 756.66 | 9,317.23 | 9,079.92 |
| Telephone | (164.09) | 441.66 | 5,390.61 | 5,299.92 |
| Van Lease | 687.13 | 532.75 | 12,451.34 | 6,393.00 |
| Insurance | 112.97 | 527.41 | 5,972.46 | 6,328.92 |
| Provider Assessment | 3,099.43 | 3,038.50 | 37,010.25 | 36,462.00 |
| Interest | 322.35 | 272.75 | 3,741.00 | 3,273.00 |
| Total Fixed Expenses | 8,901.54 | 8,023.22 | 106,147.20 | 96,278.64 |
| Total Expenses Before Allocations | 33,962.12 | 39,728.65 | 428,967.10 | 476,743.80 |
| Net Income (Loss) Before Allocati | 17,393.68 | 10,301.76 | 184,383.77 | 123,621.12 |
| Allocations | | | | |
| Services & Operations | (165,638.34) | | | |

LifeDesigns, Inc.
Highland GH Cost Center 402
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|--------------------------|-------------------------|--------------------------|--------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Total Allocations | (\$165,638.34) | | | |
| Net Income (Loss) After Allocation | 183,032.02 | 10,301.76 | 184,383.77 | 123,621.12 |
| Net Income | <u>183,032.02</u> | <u>10,301.76</u> | <u>184,383.77</u> | <u>123,621.12</u> |
| Total Overtime | 5,409.14 | 4,276.66 | 46,460.49 | 51,319.92 |

LifeDesigns, Inc.
Jefferson Cost Center 403
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|--|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Group Home & Customer Liabilities | <u>\$38,680.10</u> | <u>\$55,235.16</u> | <u>\$658,525.10</u> | <u>\$662,821.92</u> |
| Total Service Revenue | 38,680.10 | 55,235.16 | 658,525.10 | 662,821.92 |
| Other Revenue: | | | | |
| Grant Revenue | <u> </u> | <u> </u> | <u>2,500.00</u> | <u> </u> |
| Total Other Revenue | | | 2,500.00 | |
| Total Revenue | 38,680.10 | 55,235.16 | 661,025.10 | 662,821.92 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Day Program Salaries | | | 538.56 | |
| DSP Salaries | 8,891.08 | 15,318.00 | 116,960.63 | 183,816.00 |
| Group Home Mgr | 2,232.26 | 2,440.41 | 27,285.56 | 29,284.92 |
| Accrued PTO | (271.63) | 65.16 | (2,288.37) | 781.92 |
| Direct Service Staff Overtime | 3,032.03 | 3,701.66 | 51,292.37 | 44,419.92 |
| DSP Bonus | | | 743.84 | |
| Laundry Salaries | <u>596.22</u> | <u> </u> | <u>7,441.28</u> | <u> </u> |
| Total Salaries | 14,479.96 | 21,525.23 | 201,973.87 | 258,302.76 |
| Benefits: | | | | |
| FICA | 1,096.74 | 1,702.50 | 15,210.24 | 20,430.00 |
| Pension Contribution | | 105.00 | | 1,260.00 |
| Other Benefits | <u>1,344.10</u> | <u>3,270.83</u> | <u>23,012.52</u> | <u>39,249.96</u> |
| Total Benefits | 2,440.84 | 5,078.33 | 38,222.76 | 60,939.96 |
| Other Variable Expenses | | | | |
| Independent Contractor | 2,873.35 | | 21,218.73 | |
| Nursing & Other Nursing | 73.50 | 199.99 | 1,676.10 | 2,399.88 |
| Dietician | | 75.00 | 765.00 | 900.00 |
| Food | 1,082.27 | 1,541.66 | 16,319.25 | 18,499.92 |
| Laundry Supplies | 39.53 | 40.00 | 171.49 | 480.00 |
| Housekeeping | 405.29 | 400.00 | 4,667.50 | 4,800.00 |
| Other Operations | | 50.00 | 464.95 | 600.00 |
| Repairs & Maintenance | 691.66 | | 14,796.85 | |
| Small Equipment | (437.21) | | 672.87 | |
| Publicity & Advertising | 12.39 | | 2,022.95 | |
| Travel | 986.83 | 833.33 | 8,470.50 | 9,999.96 |
| Licenses, Dues, Subscriptions | | 50.00 | (28.16) | 600.00 |
| Office Supplies | 28.03 | 40.00 | 536.87 | 480.00 |
| Training Resources | 28.00 | 25.00 | 140.00 | 300.00 |
| Activity Supplies | (1,329.37) | 300.00 | 3,418.81 | 3,600.00 |
| Behavior | | | 844.29 | |
| Pharmacist | 142.05 | 250.00 | 2,554.38 | 3,000.00 |
| Day Service | 4,957.68 | 5,000.00 | 61,146.89 | 60,000.00 |
| Non-reimbursable Expense | 1,482.56 | | 1,482.56 | |
| Loss on Disposal of Assets | <u>2,459.88</u> | <u> </u> | <u>2,459.88</u> | <u> </u> |
| Total Other Variable Expenses | 13,496.44 | 8,804.98 | 143,801.71 | 105,659.76 |
| Total Variable Expenses | 30,417.24 | 35,408.54 | 383,998.34 | 424,902.48 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 910.33 | 1,131.15 | 13,070.50 | 13,573.80 |
| Utilities | 521.54 | 687.91 | 6,632.10 | 8,254.92 |
| Telephone | 1,404.86 | 433.33 | 7,355.05 | 5,199.96 |
| Insurance | (15.46) | 555.99 | 6,600.17 | 6,671.88 |
| Provider Assessment | 2,803.73 | 2,513.08 | 32,772.66 | 30,156.96 |
| Interest | <u>45.94</u> | <u>59.16</u> | <u>697.10</u> | <u>709.92</u> |
| Total Fixed Expenses | 5,670.94 | 5,380.62 | 67,127.58 | 64,567.44 |
| Total Expenses Before Allocations | 36,088.18 | 40,789.16 | 451,125.92 | 489,469.92 |
| Net Income (Loss) Before Allocati | 2,591.92 | 14,446.00 | 209,899.18 | 173,352.00 |
| Allocations | | | | |
| Services & Operations | <u>(183,425.46)</u> | <u> </u> | <u> </u> | <u> </u> |
| Total Allocations | (183,425.46) | | | |

LifeDesigns, Inc.
 Jefferson Cost Center 403
 For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|--------------------------|-------------------------|--------------------------|--------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Net Income (Loss) After Allocation | \$186,017.38 | \$14,446.00 | \$209,899.18 | \$173,352.00 |
| Net Income | <u>186,017.38</u> | <u>14,446.00</u> | <u>209,899.18</u> | <u>173,352.00</u> |
| Total Overtime | 3,032.03 | 3,701.66 | 51,292.37 | 44,419.92 |

LifeDesigns, Inc.
Rhinestone Cost Center 406
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-----------------|--------|---------------------|--------|
| | Actual | Budget | Actual | Budget |
| Revenue | | | | |
| Service Revenue: | | | | |
| Other Revenue: | | | | |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Benefits: | | | | |
| Other Variable Expenses | | | | |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | \$86.33 | | \$86.33 | |
| Total Fixed Expenses | 86.33 | | 86.33 | |
| Total Expenses Before Allocations | 86.33 | | 86.33 | |
| Net Income (Loss) Before Allocati | (86.33) | | (86.33) | |
| Allocations | | | | |
| Net Income (Loss) After Allocation | (86.33) | | (86.33) | |
| Net Income | (86.33) | | (86.33) | |

LifeDesigns, Inc.
Winslow Cost Center 409
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|--|------------------|------------------|---------------------|-------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Group Home & Customer Liabilities | \$50,222.31 | \$47,403.41 | \$535,051.24 | \$568,840.92 |
| Total Service Revenue | 50,222.31 | 47,403.41 | 535,051.24 | 568,840.92 |
| Other Revenue: | | | | |
| Total Revenue | 50,222.31 | 47,403.41 | 535,051.24 | 568,840.92 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Day Program Salaries | | | 3,042.66 | |
| DSP Salaries | 7,217.73 | 11,555.08 | 100,919.45 | 138,660.96 |
| Group Home Mgr | 3,459.98 | 2,631.25 | 36,649.72 | 31,575.00 |
| Accrued PTO | 621.06 | 65.16 | 3,628.70 | 781.92 |
| Direct Service Staff Overtime | 4,161.92 | 2,584.50 | 32,821.73 | 31,014.00 |
| DSP Bonus | | | 977.85 | |
| Laundry Salaries | 407.49 | 305.66 | 3,517.39 | 3,667.92 |
| Total Salaries | 15,868.18 | 17,141.65 | 181,557.50 | 205,699.80 |
| Benefits: | | | | |
| FICA | 1,135.22 | 1,306.33 | 13,109.07 | 15,675.96 |
| Pension Contribution | (157.90) | | | |
| Other Benefits | 2,034.23 | 1,400.00 | 17,768.27 | 16,800.00 |
| Total Benefits | 3,011.55 | 2,706.33 | 30,877.34 | 32,475.96 |
| Other Variable Expenses | | | | |
| Nursing & Other Nursing | 62.87 | 99.99 | 695.80 | 1,199.88 |
| Dietician | | 75.00 | 720.00 | 900.00 |
| Food | 1,371.82 | 1,916.66 | 18,220.47 | 22,999.92 |
| Laundry Supplies | 29.62 | 40.00 | 458.64 | 480.00 |
| Housekeeping | 153.17 | 275.00 | 3,640.89 | 3,300.00 |
| Other Operations | | 16.66 | 39.00 | 199.92 |
| Repairs & Maintenance | (1,925.77) | 914.16 | 13,307.06 | 10,969.92 |
| Small Equipment | (382.00) | 25.83 | 343.39 | 309.96 |
| Publicity & Advertising | 12.40 | 41.66 | 1,993.47 | 499.92 |
| Travel | 220.44 | 291.66 | 4,997.57 | 3,499.92 |
| Office Supplies | 1.15 | 25.00 | 94.17 | 300.00 |
| Training Resources | 28.00 | 8.33 | 168.00 | 99.96 |
| Activity Supplies | (900.51) | 300.00 | 2,702.89 | 3,600.00 |
| Recreational Behavior | | | 75.64 | |
| Pharmacist | 280.18 | 208.33 | 1,744.29 | 2,499.96 |
| Day Service | 8,493.60 | 5,701.91 | 58,938.94 | 68,422.92 |
| Non-reimbursable Expense | 489.91 | | 489.91 | |
| Loss on Disposal of Assets | 631.40 | | 750.91 | |
| Total Other Variable Expenses | 8,566.28 | 9,940.19 | 109,811.15 | 119,282.28 |
| Total Variable Expenses | 27,446.01 | 29,788.17 | 322,245.99 | 357,458.04 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 1,618.08 | 992.90 | 15,811.78 | 11,914.80 |
| Utilities | 469.66 | 416.66 | 6,031.59 | 4,999.92 |
| Telephone | 780.01 | 250.00 | 1,879.64 | 3,000.00 |
| Van Lease | | 465.91 | 5,590.92 | 5,590.92 |
| Insurance | 715.46 | 402.66 | 5,158.23 | 4,831.92 |
| Provider Assessment | 2,523.28 | 2,658.75 | 30,685.71 | 31,905.00 |
| Interest | 45.96 | 39.41 | 697.50 | 472.92 |
| Total Fixed Expenses | 6,152.45 | 5,226.29 | 60,264.45 | 62,715.48 |
| Total Expenses Before Allocations | 33,598.46 | 35,014.46 | 382,510.44 | 420,173.52 |
| Net Income (Loss) Before Allocati | 16,623.85 | 12,388.95 | 152,540.80 | 148,667.40 |
| Allocations | | | | |
| Services & Operations | (142,894.99) | | | |
| Total Allocations | (142,894.99) | | | |

LifeDesigns, Inc.
Winslow Cost Center 409
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|--------------------------|-------------------------|--------------------------|--------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Net Income (Loss) After Allocation | \$159,518.84 | \$12,388.95 | \$152,540.80 | \$148,667.40 |
| Net Income | <u>159,518.84</u> | <u>12,388.95</u> | <u>152,540.80</u> | <u>148,667.40</u> |
| Total Overtime | 4,161.92 | 2,584.50 | 32,821.73 | 31,014.00 |

LifeDesigns, Inc.
Fairlawn Cost Center 411
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-----------------|-------------------|---------------------|--------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Prior Year & Rate Adjustments | | | (\$1,003.00) | |
| Total Service Revenue | | | (1,003.00) | |
| Other Revenue: | | | | |
| Total Revenue | | | (1,003.00) | |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| Benefits: | | | | |
| Other Variable Expenses | | | | |
| Other Operations | | | 300.00 | |
| Repairs & Maintenance | | 208.33 | 2,040.00 | 2,499.96 |
| Publicity & Advertising | 6.90 | | 6.90 | |
| Office Supplies | | | 10.84 | |
| Total Other Variable Expenses | 6.90 | 208.33 | 2,357.74 | 2,499.96 |
| Total Variable Expenses | 6.90 | 208.33 | 2,357.74 | 2,499.96 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | (118.97) | 1,335.08 | 14,534.46 | 16,020.96 |
| Utilities | 241.11 | 308.33 | 2,575.66 | 3,699.96 |
| Telephone | | 83.33 | 68.36 | 999.96 |
| Van Lease | | | 1,448.62 | |
| Interest | 299.84 | 274.41 | 3,734.62 | 3,292.92 |
| Total Fixed Expenses | 421.98 | 2,001.15 | 22,361.72 | 24,013.80 |
| Total Expenses Before Allocations | 428.88 | 2,209.48 | 24,719.46 | 26,513.76 |
| Net Income (Loss) Before Allocati | (428.88) | (2,209.48) | (25,722.46) | (26,513.76) |
| Allocations | | | | |
| Services & Operations | 295.62 | | | |
| Total Allocations | 295.62 | | | |
| Net Income (Loss) After Allocation | (724.50) | (2,209.48) | (25,722.46) | (26,513.76) |
| Net Income | (724.50) | (2,209.48) | (25,722.46) | (26,513.76) |

LifeDesigns, Inc.
Limestone Cost Center 412
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|---------------------|--------------------|---------------------|---------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Group Home & Customer Liabilities | <u>\$61,785.02</u> | <u>\$50,764.33</u> | <u>\$695,920.60</u> | <u>\$609,171.96</u> |
| Total Service Revenue | 61,785.02 | 50,764.33 | 695,920.60 | 609,171.96 |
| Other Revenue: | | | | |
| | | | | |
| Total Revenue | 61,785.02 | 50,764.33 | 695,920.60 | 609,171.96 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| DSP Salaries | 6,227.55 | 12,066.91 | 111,203.78 | 144,802.92 |
| Group Home Mgr | 2,716.65 | 2,459.66 | 32,835.70 | 29,515.92 |
| Accrued PTO | (3,168.12) | 65.16 | (2,815.50) | 781.92 |
| Direct Service Staff Overtime | 5,295.48 | 2,431.16 | 41,728.29 | 29,173.92 |
| DSP Bonus | | | 1,196.89 | |
| Laundry Salaries | <u>611.45</u> | <u>658.66</u> | <u>5,931.34</u> | <u>7,903.92</u> |
| Total Salaries | 11,683.01 | 17,681.55 | 190,080.50 | 212,178.60 |
| Benefits: | | | | |
| FICA | 860.56 | 1,347.66 | 13,963.32 | 16,171.92 |
| Other Benefits | <u>722.96</u> | <u>2,032.50</u> | <u>14,941.44</u> | <u>24,390.00</u> |
| Total Benefits | 1,583.52 | 3,380.16 | 28,904.76 | 40,561.92 |
| Other Variable Expenses | | | | |
| Independent Contractor | | | 1,733.61 | |
| Nursing & Other Nursing | 305.00 | 166.66 | 859.31 | 1,999.92 |
| Dietician | | 83.33 | 562.50 | 999.96 |
| Food | 1,869.01 | 1,700.00 | 20,412.35 | 20,400.00 |
| Laundry Supplies | | 40.00 | 45.00 | 480.00 |
| Housekeeping | 292.69 | 250.00 | 4,646.96 | 3,000.00 |
| Other Operations | | 25.00 | 235.73 | 300.00 |
| Repairs & Maintenance | 706.84 | 750.00 | 13,243.26 | 9,000.00 |
| Small Equipment | (525.00) | 16.66 | 591.18 | 199.92 |
| Publicity & Advertising | 12.40 | 62.50 | 1,800.32 | 750.00 |
| Travel | 336.30 | 437.50 | 5,082.30 | 5,250.00 |
| Licenses, Dues, Subscriptions | | 16.66 | | 199.92 |
| Office Supplies | 21.93 | 50.00 | 333.03 | 600.00 |
| Training Resources | | | 216.00 | |
| Activity Supplies | (1,207.71) | 316.66 | 1,579.49 | 3,799.92 |
| Behavior | | | 446.04 | |
| Pharmacist | 113.73 | 250.00 | 2,748.35 | 3,000.00 |
| Day Service | 4,497.03 | 5,000.00 | 90,460.13 | 60,000.00 |
| Non-reimbursable Expense | 1,490.66 | | 1,490.66 | |
| Loss on Disposal of Assets | | | 39.88 | |
| Total Other Variable Expenses | 7,912.88 | 9,164.97 | 146,526.10 | 109,979.64 |
| Total Variable Expenses | 21,179.41 | 30,226.68 | 365,511.36 | 362,720.16 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 1,509.20 | 1,331.66 | 16,429.57 | 15,979.92 |
| Utilities | 571.72 | 627.33 | 8,513.32 | 7,527.96 |
| Telephone | 308.22 | 291.66 | 2,445.75 | 3,499.92 |
| Insurance | 596.78 | 473.49 | 5,740.46 | 5,681.88 |
| Provider Assessment | 3,076.98 | 2,947.16 | 36,534.36 | 35,365.92 |
| Interest | <u>295.94</u> | <u>315.99</u> | <u>3,757.74</u> | <u>3,791.88</u> |
| Total Fixed Expenses | 6,358.84 | 5,987.29 | 73,421.20 | 71,847.48 |
| Total Expenses Before Allocations | 27,538.25 | 36,213.97 | 438,932.56 | 434,567.64 |
| Net Income (Loss) Before Allocati | 34,246.77 | 14,550.36 | 256,988.04 | 174,604.32 |
| Allocations | | | | |
| Services & Operations | <u>(186,900.65)</u> | | | |
| Total Allocations | (186,900.65) | | | |
| Net Income (Loss) After Allocation | 221,147.42 | 14,550.36 | 256,988.04 | 174,604.32 |

LifeDesigns, Inc.
Limestone Cost Center 412
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|-------------------|----------------------------|---------------------------|----------------------------|----------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Net Income | <u>\$221,147.42</u> | <u>\$14,550.36</u> | <u>\$256,988.04</u> | <u>\$174,604.32</u> |
| Total Overtime | 5,295.48 | 2,431.16 | 41,728.29 | 29,173.92 |

LifeDesigns, Inc.
Dunn Cost Center 413
For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|---|-------------------|------------------|---------------------|-------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Revenue | | | | |
| Service Revenue: | | | | |
| Group Home & Customer Liabilities | \$41,433.36 | \$39,252.00 | \$484,653.33 | \$471,024.00 |
| Total Service Revenue | 41,433.36 | 39,252.00 | 484,653.33 | 471,024.00 |
| Other Revenue: | | | | |
| Total Revenue | 41,433.36 | 39,252.00 | 484,653.33 | 471,024.00 |
| Expenses | | | | |
| Variable Expenses | | | | |
| Salaries: | | | | |
| DSP Salaries | 5,818.69 | 11,536.58 | 99,763.14 | 138,438.96 |
| Group Home Mgr | 2,123.19 | 2,459.66 | 27,494.47 | 29,515.92 |
| Accrued PTO | 694.10 | 65.16 | (605.22) | 781.92 |
| Direct Service Staff Overtime | 7,137.69 | 3,149.00 | 49,069.83 | 37,788.00 |
| DSP Bonus | | | 759.47 | |
| Laundry Salaries | 363.84 | 209.08 | 3,924.62 | 2,508.96 |
| Total Salaries | 16,137.51 | 17,419.48 | 180,406.31 | 209,033.76 |
| Benefits: | | | | |
| FICA | 1,199.12 | 1,327.66 | 13,327.03 | 15,931.92 |
| Pension Contribution | 316.80 | | 516.23 | |
| Other Benefits | 2,776.28 | 1,346.00 | 24,830.44 | 16,152.00 |
| Total Benefits | 4,292.20 | 2,673.66 | 38,673.70 | 32,083.92 |
| Other Variable Expenses | | | | |
| Nursing & Other Nursing | 41.31 | 75.00 | 892.32 | 900.00 |
| Dietician | | 54.16 | 540.00 | 649.92 |
| Food | 1,030.23 | 1,125.00 | 14,185.76 | 13,500.00 |
| Laundry Supplies | 19.98 | 20.83 | 339.93 | 249.96 |
| Housekeeping | 172.50 | 187.50 | 2,545.00 | 2,250.00 |
| Other Operations | | | 2,785.00 | |
| Repairs & Maintenance | (2,480.83) | 1,125.00 | 16,770.56 | 13,500.00 |
| Small Equipment | (1,360.00) | 41.66 | (583.00) | 499.92 |
| Publicity & Advertising | 5.50 | 95.83 | 1,962.60 | 1,149.96 |
| Travel | 95.75 | 183.33 | 2,196.46 | 2,199.96 |
| Licenses, Dues, Subscriptions | | 16.66 | | 199.92 |
| Office Supplies | 0.84 | 22.91 | 343.85 | 274.92 |
| Training Resources | | 8.33 | 196.00 | 99.96 |
| Activity Supplies | (1,526.23) | 416.66 | 4,597.56 | 4,999.92 |
| Behavior | (7,601.28) | 666.66 | 21,101.73 | 7,999.92 |
| Pharmacist | 25.25 | 91.66 | 576.24 | 1,099.92 |
| Non-reimbursable Expense | 848.68 | | 848.68 | |
| Loss on Disposal of Assets | 644.60 | | 714.36 | |
| Total Other Variable Expenses | (10,083.70) | 4,131.19 | 70,013.05 | 49,574.28 |
| Total Variable Expenses | 10,346.01 | 24,224.33 | 289,093.06 | 290,691.96 |
| Fixed Expenses: | | | | |
| Depreciation & Amortization | 2,522.66 | 1,621.33 | 20,127.35 | 19,455.96 |
| Utilities | 700.35 | 483.33 | 6,417.44 | 5,799.96 |
| Telephone | 1,366.06 | 225.00 | 3,739.04 | 2,700.00 |
| Van Lease | 174.65 | 532.75 | 9,738.11 | 6,393.00 |
| Insurance | 709.17 | 422.49 | 5,281.67 | 5,069.88 |
| Provider Assessment | 2,413.08 | 2,269.25 | 28,525.56 | 27,231.00 |
| Interest | 310.30 | 325.00 | 3,862.74 | 3,900.00 |
| Total Fixed Expenses | 8,196.27 | 5,879.15 | 77,691.91 | 70,549.80 |
| Total Expenses Before Allocations | 18,542.28 | 30,103.48 | 366,784.97 | 361,241.76 |
| Net Income (Loss) Before Allocati | 22,891.08 | 9,148.52 | 117,868.36 | 109,782.24 |
| Allocations | | | | |
| Services & Operations | (130,631.45) | | | |
| Total Allocations | (130,631.45) | | | |
| Net Income (Loss) After Allocation | 153,522.53 | 9,148.52 | 117,868.36 | 109,782.24 |

LifeDesigns, Inc.
 Dunn Cost Center 413
 For the Twelve Months Ending December 31, 2018

| | December | | Year To Date | |
|-------------------|----------------------------|--------------------------|----------------------------|----------------------------|
| | <u>Actual</u> | <u>Budget</u> | <u>Actual</u> | <u>Budget</u> |
| Net Income | <u>\$153,522.53</u> | <u>\$9,148.52</u> | <u>\$117,868.36</u> | <u>\$109,782.24</u> |
| Total Overtime | 7,137.69 | 3,149.00 | 49,069.83 | 37,788.00 |

LifeDesigns, Inc.
Statement of Financial Position
For the 12 months ended December 31, 2018

LIFEDesigns

ASSETS

| | |
|---|--------------------------|
| Current Assets: | |
| Cash & Cash Equivalents | 3,089,606 |
| Cash - Internet Sales | 50,988 |
| Cash - Crawford Project | 0 |
| Cash - Covey Lane Deposits | 10,346 |
| Certificates of Deposit - Raymond James | 0 |
| Total Cash | <u>3,150,940</u> |
| Accounts Receivable | 1,418,549 |
| Accounts Receivable - Developer Fee | 0 |
| Accounts Receivable - Dr. Brewer | 0 |
| Accounts Receivable - Workers' Comp | 0 |
| Accounts Receivable Retainage | 0 |
| Less: Allowance for Doubtful Accounts | -68,166 |
| Accounts Receivable County Tax | 0 |
| Accounts Receivable Net | <u>1,350,383</u> |
| Other Current Assets | 6,467 |
| Total Current Assets | 4,507,790 |
| Investments: | |
| Endowment Fund Raymond Janes | 0 |
| Endowment Fund Heritage | 23,198 |
| Endowment Fund Community Foundation | 19,686 |
| Endowment Fund Brown Co. Community Foundation | 13,129 |
| Endowment Fund ONB IMA | 481,890 |
| Cash in Bank ONB Ops Fund | 474,401 |
| Investment in LifeDesigns-McKinley | 989,790 |
| Investment in Crawford | 100 |
| Total Investments | <u>2,002,195</u> |
| Mortgage Receivable Crawford Apartments | 1,065,000 |
| Mortgage Interest Receivable Crawford Apts | 182,100 |
| Mortgage Receivable Crawford II | 900,000 |
| Mortgage Interest Receivable Crawford II | 33,752 |
| Note Receivable LifeDesigns-McKinley | 22,500 |
| Property and Equipment | 6,298,956 |
| Less: Accumulated Depreciation | <u>-2,376,870</u> |
| Net Property and Equipment | 3,922,085 |
| TOTAL ASSETS | <u>12,601,670</u> |

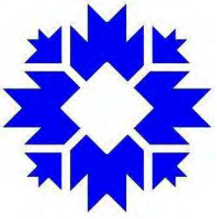
LIABILITIES AND NET ASSETS

| | |
|---|---------------------------------|
| Current Liabilities: | |
| Current Maturities of Long-term Debt | 165,381 |
| Accounts Payable | 234,278 |
| Accrued Salaries | 727,807 |
| Payroll Taxes | 54,561 |
| Rental Deposits - Covey Lane | 10,396 |
| rental Deposits - Orris | 1,026 |
| Deposits - Private Pay | 1,335 |
| Deferred Revenue Week of Chocolate | 2,160 |
| County Tax Received in Advance | 0 |
| Medicaid Payable | 2,939 |
| Total Current Liabilities | <u>1,199,883</u> |
| Non-Current Liabilities: | |
| Long-term Debt, Less Current Maturities | 1,650,359 |
| Total Liabilities | <u>2,850,242</u> |
| Net Assets: | |
| Fund Balance | 9,156,872 |
| YTD Net Income (Loss) | 628,308 |
| Total Net Assets | <u>9,785,180</u> |
| TOTAL LIABILITIES AND NET ASSETS | <u><u>12,635,422</u></u> |

LifeDesigns, Inc.
Statement of Activities
For the 12 months ended December 31, 2018
Total Agency

| | Current Month | | Year to Date | |
|-----------------------------------|---------------|--------------|---------------|---------------|
| | Actual | Budget | YTD Actual | YTD Budget |
| Revenue | | | | |
| Medicaid Revenue | 243,477 | 242,685 | 2,987,001 | 2,912,224 |
| MW Income ATTC | 3,153 | 3,184 | 43,737 | 38,208 |
| Waiver RH10 | 6,609 | 8,955 | 92,498 | 107,463 |
| Waiver RH20 | 217,730 | 169,589 | 2,403,004 | 2,035,072 |
| Waiver EMS | 15,973 | 7,267 | 78,812 | 87,209 |
| Waiver IBI | 5,078 | 5,097 | 68,611 | 61,169 |
| Waiver Workplace Assistance | 111 | 0 | 1,419 | 0 |
| Waiver RBHA | 0 | 0 | 0 | 0 |
| Waiver Trip Revenue | 8,685 | 11,312 | 124,531 | 135,741 |
| Waiver PAC | 10,211 | 13,434 | 136,323 | 161,205 |
| Waiver Daily Rate | 263,305 | 373,530 | 3,753,922 | 4,482,358 |
| MW Income: RHSA | 0 | 0 | 0 | 0 |
| MW Income: DSRV | 0 | 0 | 0 | 0 |
| MW Income Startup | 0 | 0 | 0 | 0 |
| MW Income SE | 102 | 958 | 14,017 | 11,500 |
| MW Income: SF20 Employment | 0 | 0 | 0 | 0 |
| MW Income: SF30 Employment | 0 | 0 | 0 | 0 |
| MW Income: SF40 Employment | 0 | 0 | 0 | 0 |
| Waiver SE Follow | 0 | 0 | 0 | 0 |
| MW Income CHP1 | 18,016 | 23,542 | 239,325 | 282,501 |
| MA Waiver BMG10 | 15,779 | 21,250 | 361,588 | 255,000 |
| MW Income CHGO | 5,896 | 6,960 | 105,673 | 83,517 |
| MW Income RATT | 1,996 | 4,414 | 40,037 | 52,967 |
| MW Income RCCR | 0 | 0 | 0 | 0 |
| MW Income AF01 | 1,193 | 1,483 | 17,376 | 17,791 |
| MW Income AF01 | <u>3,086</u> | <u>3,086</u> | <u>37,548</u> | <u>37,033</u> |
| Medicaid Contractual Adjustment | 0 | 0 | 0 | 0 |
| Total Medicaid Revenue | 820,400 | 896,746 | 10,505,422 | 10,760,957 |
| Other Service Revenue | | | | |
| VR | 31,485 | 30,667 | 456,739 | 368,000 |
| DDRS RLA | 0 | 0 | 0 | 0 |
| DDRS Electronic Monitoring | 0 | 0 | 0 | 0 |
| DDRS Income SIAS | 0 | 0 | 0 | 0 |
| DDRS Respite | 0 | 0 | 0 | 0 |
| DDRS XXSE Employment | 0 | 0 | 0 | 0 |
| DDRS SRHS1 | 0 | 0 | 0 | 0 |
| DDRS SRHS3 | 0 | 0 | 0 | 0 |
| DDRS SCFC1 | 0 | 0 | 0 | 0 |
| DDRS T1 | 0 | 0 | 0 | 0 |
| DDRS Group Hab | 0 | 0 | 0 | 0 |
| DDRS Indirect SC | 0 | 0 | 0 | 0 |
| DDRS Caregiver CEO | 0 | 0 | 0 | 0 |
| Respite | 0 | 0 | 0 | 0 |
| DDRS | 0 | 0 | 0 | 0 |
| Private Pay | 4,401 | 5,652 | 57,932 | 67,826 |
| BMGO Behavior - Group Homes | 0 | 0 | 0 | 0 |
| Cobra Premium Income | 0 | 0 | 0 | 0 |
| Rental Income Covey | 13,031 | 14,622 | 162,948 | 175,459 |
| Prior Year Income | -622 | 0 | 85,754 | 0 |
| Total Other Service Revenue | 48,296 | 50,940 | 763,373 | 611,285 |
| Total Service Revenue | 868,696 | 947,687 | 11,268,795 | 11,372,242 |
| Other Revenue | | | | |
| Grant Revenue | 0 | 3,198 | 72,219 | 38,376 |
| Grant Revenue McKinley | 0 | 0 | 5,000 | 0 |
| Grant Revenue Crawford II LP | 0 | 0 | 235,000 | 0 |
| Donations | 6,744 | 3,002 | 73,698 | 36,022 |
| Donations Shelly Siscoe Fund | 0 | 0 | 0 | 0 |
| Endowment Contributions | 0 | 0 | 0 | 0 |
| Endowment Contributions | 0 | 0 | 0 | 0 |
| Endowment Contributions | -3,001 | 0 | -3,001 | 0 |
| Endowment Contributions | 0 | 0 | 0 | 0 |
| Fundraising | 8,700 | 5,833 | 67,752 | 70,000 |
| Capital Campaign | 0 | 0 | 0 | 0 |
| Grant Revenue Highland & Crawford | 0 | 0 | 0 | 0 |
| Interest Income | 25,040 | 0 | 25,417 | 0 |
| County Funding | 29,994 | 28,840 | 359,923 | 346,080 |
| Unrealized Gain on Endowment Fund | -80,199 | 0 | -35,358 | 0 |
| Dividend Income | 5,835 | 333 | 16,406 | 4,000 |
| Miscellaneous Income | 128 | 31 | 11,038 | 375 |
| Total Other Revenue | -6,759 | 41,238 | 828,095 | 494,853 |
| Total Revenue | 861,937 | 988,925 | 12,096,891 | 11,867,094 |

| | | | | |
|--|---------|-----------|------------|------------|
| Expenses | | | | |
| Variable Expenses | | | | |
| DDRS Related | 0 | 0 | 0 | 0 |
| Householders/Indep Contractors | 66,708 | 41,545 | 666,438 | 498,545 |
| Grant Expenses, NAP, County Vouchers | 0 | 0 | 1,930 | 0 |
| Nursing | 601 | 667 | 5,262 | 8,000 |
| Food & Dietary | 7,116 | 8,379 | 94,265 | 100,550 |
| Housekeeping & Laundry | 2,061 | 2,588 | 29,518 | 31,060 |
| Repairs & Maintenance; Small Equip | -9,476 | 10,206 | 133,504 | 122,469 |
| Legal & Accounting | 40,516 | 7,662 | 138,765 | 91,950 |
| Adv. Promotions, Help Wanted Ads | 9,661 | 9,198 | 123,556 | 110,375 |
| Travel | 15,952 | 18,175 | 226,545 | 218,102 |
| Licenses, Dues, Subscriptions | 2,497 | 3,703 | 44,295 | 44,440 |
| Supplies, Postage, Copies | 2,978 | 1,998 | 23,570 | 23,974 |
| Activities & Recreation | -7,185 | 2,427 | 19,633 | 29,122 |
| Day Service | 22,640 | 20,119 | 266,387 | 241,423 |
| Pharmacy | 618 | 1,377 | 14,178 | 16,527 |
| Physical Therapy | 0 | 0 | 0 | 0 |
| Speech Therapy | 0 | 0 | 0 | 0 |
| Occupational Therapy | 0 | 0 | 0 | 0 |
| Salaries | 529,363 | 651,419 | 7,098,939 | 7,817,029 |
| Benefits | 126,772 | 143,945 | 1,545,499 | 1,727,345 |
| Conf, Inservices, & Training Materials | 3,774 | 4,377 | 44,844 | 52,526 |
| Bad Debt | -1,367 | 0 | -1,367 | 0 |
| Background Checks | 853 | 608 | 8,738 | 7,300 |
| Donation Expense | 793 | 0 | 793 | 0 |
| Miscellaneous | 21,775 | 1,251 | 45,687 | 15,016 |
| Total Variable Expenses | 836,647 | 929,646 | 10,530,981 | 11,155,749 |
| Fixed Expenses | | | | |
| Depreciation & Amortization | 30,575 | 27,607 | 333,782 | 331,286 |
| Utilities & Phone | 14,236 | 9,346 | 123,511 | 112,155 |
| Office Lease | 720 | 720 | 8,640 | 8,640 |
| Van Lease | 1,149 | 2,070 | 38,963 | 24,843 |
| Copier Lease | 1,133 | 1,350 | 15,185 | 16,200 |
| Insurance | 14,423 | 15,245 | 173,871 | 182,943 |
| Provider Assessment | 13,917 | 13,427 | 165,529 | 161,121 |
| Interest | 6,348 | 6,591 | 78,121 | 79,095 |
| Total Fixed Expenses | 82,501 | 76,357 | 937,602 | 916,282 |
| Total Expenses | 919,148 | 1,006,003 | 11,468,583 | 12,072,032 |
| Results of Current Operations | -57,211 | -17,078 | 628,308 | -204,937 |
| Gain/Loss on Sale of Assets | 0 | 0 | 0 | 0 |
| Net Income (Loss) | -57,211 | -17,078 | 628,308 | -204,937 |
| Serv Rev - Total Expenses | -20,458 | | 160,136 | |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: MUM – Made Up Mind, Inc

Address: 840 W 17th St., Suite 7, Bloomington, IN 47404

Phone: 812-822-0876

E-Mail: mummadeupmind@gmail.com

Website: mummadeupmind.org

President of Board of Directors: Ana Bouwkamp

Name of Executive Director: Antonio Jackson

Phone: 812-947-1479

E-Mail: bbmoving812@gmail.com

Name and Title of Person to Present Proposal to the Committee: Ana Bouwkamp, Board President & Antonio Jackson, Executive Director

Phone: 574-870-5893

E-Mail: ab.futbol1@gmail.com

Name of Grant Writer: Ana Bouwkamp

Phone: 574-870-5893

E-Mail: ab.futbol1@gmail.com

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [X] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~30 |

AGENCY 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.

Our mission is to develop the capabilities of ex-offenders who have made up their mind to stay out of prison, through our transitional life training and hands-on work experience, thus breaking the cycle of homelessness, addiction, and incarceration.

MUM was incorporated in November of 2017, in light of our growing community challenge to reunite and heal families that are handicapped by their traumatic experiences of incarceration, addiction, and poverty. MUM exists to help ex-offenders navigate the landscape of social services in Bloomington, and to provide an individually-tailored, relationship-centered support structure that weaves-together existing ex-offender services while supplementing service-gaps with unique courses, programs, and personal development opportunities that, in combination, restore client self-sufficiency, family relations, and sense of community.

PROJECT INFORMATION

Project Name: MUM Community Center

Total cost of project: \$61,200 + plus more than 1,500 hours of volunteer time

Requested amount of JHSSF funding: \$18,900

Total number of City residents anticipated to be served by this project in 2019: ~20 individuals plus their families

Total number of clients anticipated to be served by this project in 2019: We anticipate that around 20 individuals will be served with most of the services and between 40-60 more with one service or more.

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

MUM is requesting \$18,900 to run our MUM Community Center Pilot Project. Though Bloomington has a unique wealth of social service organizations, navigating the landscape of programs and services can be challenging for recently-released ex-offenders. Through our working relationships with Centerstone, POPs, New Leaf New Life, Shalom Center, and St. Vincent de Paul, MUM assists with this navigation by weaving-together diverse services into a personally-tailored, wrap-around structure for building self-sufficiency; however, the most consistent challenge we face is logistical: coordinating rides to dozens of locations in and around town – the courthouse, parole offices, community organizations, counselors/mentors, trainings, job opportunities, volunteer opportunities – consumes much of our time (coordination and transportation), increases our costs (fuel, driver-time), and increases our liability (due to normal road and traffic hazards exacerbated by time on the road).

Hence, we believe that our organization could operate with much greater efficiency – stretching the impact of each donation and providing services to more clients – if we could centralize service provision at a one-stop-shop location. Further, keeping the space open to the public can create a place of encounter for fostering new relationships, learning new skills, and helping similarly disadvantaged members of the community access free and low-cost services. This would be an innovative model, both for MUM and for Bloomington, so we believe it is well worth Piloting the project, to determine the extent to which we should guide future investment towards a more permanent MUM Community Center arrangement.

By securing equipment donations and devoting many hours of service, our dedicated volunteers have already begun to turn our blank, empty storefront into the beautiful beginnings of a multi-purpose community service center. JHSS funding will help cover operating expenses of this Pilot project – rent, internet connectivity, & open-hours staffing – while MUM will match these proceeds, both in monetary value and volunteer hours.

Address where project will be housed: 840 W 17th St., Suite 7, 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 to capital improvements to real estate and if you do not own the property at which the project 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.*

MUM has rented this location for two years, originally as a space for clerical work, board meetings, and limited work-training. However, given the location’s accessibility for our clients, their families, service providers, and other, nearby community members faced with poverty-related struggles, we came to see the space as having much more potential for development as a community resource. As we began to make improvements and project our financial needs for buildout, it became clear that Piloting this community center would be the most responsible approach – to our clients, partners, volunteers, and board – rather than seeking an immediate purchase. As such, with the support of JHSS grant funding, we intend to Pilot this community center over the term of the 2-year lease we are invited to renew in November of this year (2019). As we are currently expanding the two social-enterprises that provide core financing for MUM – Big Boys Moving Company and Gardens by Ana – we expect to be able to fully fund a long-term lease (or purchase) and the basic operating expenses for the MUM Community Center, by our own means, by the conclusion of the Pilot in November 2021.

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 approval needed

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

-Smithville Charitable Foundation Inc. - \$15,600 – Acceptance Pending

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

We will keep a bi-weekly reimbursement claim. The steps preceding a complete draw down include a continual expense sheet tracking all costs pertaining to the Community Center, then submission of the expenses to be reimbursed with supporting receipts and logs, then finally a report showing all costs and sources of funding and reimbursement.

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.

MUM minimizes costs through dedicated volunteer work and support from partnered businesses. MUM also requires clients to give back through volunteer hours whether it be done with MUM or other non-profits such as St. Vincent de Paul. MUM carries its own D&O insurance but the work done off premises is covered by the insurance of partnered businesses. MUM will still leverage both monetary and in-kind donations and fundraising events.

| Sources for 2019 | Promised | Applied | Secured |
|---------------------|----------|----------|---------|
| Big Boys Moving LLC | \$35,000 | \$24,000 | |
| Gardens by Ana | \$5,000 | \$1,100 | |
| Monetary Donations | | | \$2,100 |

FUNDING PRIORITIES -- RANKED

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

Yes No

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

| | Item | Cost |
|-------------|---|-----------------|
| Priority #1 | Rent Cost (6 months of rent June-November) | \$8,100 |
| | Internet | \$1,200 |
| | Staff Positions-(6 months – 20 hrs/week x \$10/hr per position) (2 people always there each 40 hrs) (this is matched by volunteers from MUM & other work experience programs such as POPS) | \$9,600 |
| | Total Requested | \$18,900 |
| Priority #2 | Rent Cost (6 months June-November) | \$8,100 |
| | Internet | \$1,200 |
| | Staff Positions-(6 months–15 hrs/week x \$10/hr per position) (2 people always there each 40 hrs) (rest fulfilled by volunteers from MUM & other work experience programs such as POPS) | \$7,200 |
| | Total Requested | \$16,500 |
| Priority #3 | Rent Cost (6 months of rent June-November) | \$8,100 |
| | Internet | \$1,200 |
| | Staff Position- (6 months – 20 hrs/week x \$10/hr) (2 people always there each 40 hrs)(rest fulfilled by volunteers from MUM & other work experience programs such as POPS) | \$4,800 |
| | Total Requested | \$14,100 |
| Priority #4 | Rent Cost (6 months June-Nov. ½ matched by in-kind donation) | \$4,050 |
| | Internet | \$1,200 |
| | Staff Positions-(6 months – 20 hrs/week x \$10/hr per position) (2 people always there each 40 hrs) (this is matched by volunteers from MUM & other work experience programs such as POPS) | \$9,600 |
| | Total Requested | \$14,850 |
| Priority #5 | Rent Cost (6 months June-Nov. ½ matched by in-kind donation) | \$4,050 |
| | Internet | \$1,200 |
| | Staff Positions-(6 months–15 hrs/week x \$10/hr per position) (2 people always there each 40 hrs) (rest fulfilled by volunteers from MUM & other work experience programs such as POPS) | \$7,200 |
| | Total Requested | \$12,450 |
| Priority #6 | Rent Cost (6 months June-Nov. ½ matched by in-kind donation) | \$4,050 |
| | Internet | \$1,200 |
| | Staff Position- (6 months – 20 hrs/week x \$10/hr) (2 people always there each 40 hrs)(rest fulfilled by volunteers from MUM & other work experience programs such as POPS) | \$4,800 |
| | Total Requested | \$10,050 |
| Priority #7 | Rent Cost (6 months of rent June-November) | \$8,100 |
| | Internet | \$1,200 |
| | Total Requested | \$9,300 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2012 SCAN Assessment identified declines in access to job training (p.72), finding a job that pays enough to meet a family's basic needs (p.71), and ability to pay for essentials such as housing, utilities, and food (p.76), with 40% of these families facing disruptions in their lives due to drug/alcohol abuse (p.106). This defines our local barriers to putting together the building blocks of a better life. The HAND 2015-2019 Consolidated Plan similarly identified substance abuse related services and job training/employment services as critical needs for our community.

MUM believes that poverty, coupled with a lack of opportunity, breeds crime which is why having a community center that can provide a safe space with all the building blocks of a healthier life is so important for people like our clients. Our community center offers immediate employment through our social-enterprises, job training, transportation, job certifications, classes on healthy relationships, meditation, Toastmaster groups, budgeting classes, free use of workout equipment to stay in shape for laborious jobs, free haircuts, and, most importantly, access to our growing network of employers that will work with individuals who have criminal records.

Many of these resources have been run by our volunteers, in the time they have to spare; but, with JHSS support, our clients will have access to them all, for 40 hours a week, in a single, safe location that is an easily accessible place for healing and personal growth.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

The MUM Community Center will be a Pilot project while MUM continues to grow its existing social enterprises (Big Boys Moving and Gardens by Ana). MUM, itself, began as a 2-year Pilot project – run with the support of value-aligned businesses and volunteers – and we were so successful that we've now grown to become a fully incorporated, community-based nonprofit. MUM has been designed as a self-sustaining nonprofit that operates and plans future growth by leveraging funds through monetary and in-kind donations, fundraising, volunteer labor, and financial/job-placement support from our social-enterprises. Nonetheless, our need for a community center is very immediate, as we have a growing list of potential clients and other individuals in our community who would greatly benefit, right away.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

The MUM community center will provide a safe space for individuals who would otherwise loiter in our parks and public properties. For example, the men who reside at the Wheeler Mission Men's Shelter will be able to come utilize our community center resources, when they have to leave the mission by 7am (they can only turn-in hand-written job applications for so many hours of their day, and coming to us would keep their hands and minds occupied and moving forward). At the MUM community center, they will be able to fill out applications online and practice other job-related skills, all while having access to the rest of the center's resources and a network of peers committed to growing self-sufficiency.

In other cases, men and women – who have a place to stay but who are still on probation or parole – will be able to come to our center to meet their probation/parole officer and then attend classes or programs, right after. For those in the process of finding a job, the center provides a drug free environment where they don't have to be around family stressors, wayward peers, or other distractions that may have been an issue for them, in the past.

Overall, it will be a community center that empowers people into self-sufficient living, while instilling a Made Up Mindset of doing "whatever it takes" to transform past barriers into future stepping stones, helping Bloomington to become a safer and healthier community for everyone.

OUTCOME INDICATORS (100 words or less)**Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

MUM will measure:

- Number of Clients and Bloomington residents served (including nonresidents that are receiving local social services).
- Recidivism rate of clientele.
- Clients' ability to secure and retain employment during their involvement in MUM and for 1 year (minimum) after they complete the program.
- Quality of Life Improvements (general index) – ability to meet material needs (client earnings vs Monroe County cost-of-living data); social-network growth (number of new/returning family members, friends, and mentors); volunteer service growth (number of hours served); personal-development growth (skill-seeking through course registrations and program participation).
- Tracking clients' progress toward self-sufficiency – their ability to meet their basic needs for housing, transportation, clothing, food, as well as their unique needs for backpay of child-support and/or restitution/court-fees.
- Tracking how many people were served – and with which services – to evaluate which services are in highest demand.
- Tracking the number of new partnerships created for or by the operation of the community center.

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.

MUM has just completed its first year as a fully incorporated community nonprofit, after starting as a 2-year pilot program. During our pilot program, MUM assisted 22 ex-offenders with finding employment, with only 2 of our clients returning to jail during the period. MUM emphasizes that having housing and employment – undergirded by a multi-service, wrap-around support structure – greatly decreases the chances of recidivism for men and women recently released from incarceration. To more completely explain the benefits of MUM, we offer more details, here, on some of the additional services we offer:

- Transportation to and from work , with a vehicle that was donated to MUM.
- Meditation, Relationship Health, and Personal Accountability classes and programs.
- ABC Kickstart Program: A is for Any job (employment in our social enterprises), until a client can get to B-a Better job (employment with partnered businesses), which will hopefully lead to C- a client’s Career job (stable, long-term employment).
- Free use of exercise and weight-training equipment, to ensure that clients have a safe and stable place to improve their physical health and to release stress.
- Guided reconciliation with clients’ families and those that may have been harmed by clients’ past, bad choices.
- Facilitated, mandatory volunteer opportunities that allow clients to experience the transformative, healing power of giving back to the community that they once only took from.

MUM does not aim to reinvent the road to reentry; we strive to weave-together a package of services and a network of providers that can pave the road ahead, for those in need. MUM would like the whole Bloomington community to be the beneficiary of our comprehensive, wrap-around service-program that is capable of drastically reducing the number of people, here, trapped in cycles of abuse, addiction, poverty, and recidivism. With JHSS support for our Pilot project MUM community center, this can soon become a more profound reality in Bloomington.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

Made Up Mind
DEPARTMENT OF THE TREASURY

Date:

JUL 19 2018

M U M - MADE UP MIND INC
840 W 17TH ST STE 7
BLOOMINGTON, IN 47404

Employer Identification Number:
82-3456280
DLN:
17053355317017
Contact Person:
KIMBERLY L KITCHENS ID# 31457
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
November 18, 2017
Contribution Deductibility:
Yes
Addendum Applies:
No

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. 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.

Letter 947

M U M - MADE UP MIND INC

Sincerely,

Stephen A. Martin

Director, Exempt Organizations
Rulings and Agreements

Statement of Operations
M.U.M. Made Up Mind
12/31/2018*

| | | |
|---------------------------|-----------------|----------|
| INCOME | | |
| Individual Contributions | \$4,637 | |
| Corporate Grants | <u>\$28,376</u> | |
| Total Income | \$33,013 | |
| | | |
| Gross Profit | | \$33,013 |
| | | |
| EXPENSES | | |
| Rent - 17 | \$16,200 | |
| Rent - TR | \$9,000 | |
| Utilities | \$2,461 | |
| Depreciation | \$1,750 | |
| Program Expenses -Clients | \$2,995 | |
| D&O Ins | <u>\$540</u> | |
| Total Expenses | | \$32,946 |
| | | |
| Net Profit/loss | | \$67 |

* Unaudited

MUM Budget 2019

| | January | February | March | April | May | June | July | August | September | October | November | December | Annual |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|
| Individual Contributions | 0 | 100 | 500 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | \$2,850 |
| Corporate Donations | 1500 | 1500 | 1500 | 1500 | 1500 | 1500 | 1500 | 1500 | 1500 | 1500 | 1500 | 1500 | \$18,000 |
| Unrestricted Grants | 0 | 0 | | 2000 | 4000 | 2000 | 4000 | 2000 | 2000 | 4000 | 2000 | 4000 | \$26,000 |
| Total Donations and Grants | 1,500 | 1,500 | 1,500 | 3,500 | 5,500 | 3,500 | 5,500 | 3,500 | 3,500 | 5,500 | 3,500 | 5,500 | 44,000 |
| Rent | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$1,350 | \$16,200 |
| Utilities | | | | | | | | | | | | | |
| Electric | 30 | 30 | 30 | 30 | 100 | 300 | 400 | 400 | 400 | 250 | 100 | 50 | 2,120 |
| Gas | 140 | 140 | 140 | 100 | 75 | 50 | 50 | 50 | 50 | 50 | 75 | 140 | 1,060 |
| Telephone/Internet | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 200 | 2,400 |
| Auto Gas | 50 | 50 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 1,100 |
| Insurance | | | | | | | | | | | | | |
| Auto | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 250 | 3,000 |
| Building/Liability | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 6,000 |
| Directors | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 1,200 |
| Office Supplies | 50 | 50 | 50 | 50 | 50 | 75 | 75 | 75 | 50 | 50 | 50 | 50 | 675 |
| Ink Cartridges | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 1,200 |
| Printing | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 50 | 600 |
| Postage and Shipping | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 300 |
| Advertising | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 1,200 |
| Software | | | 50 | | | 100 | | | | 50 | | | |
| NonEmployeeLabor Compensation (Payments made to Clients) | | | | | | | | | | | | | |
| Fund Raising Fees | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 1,200 |
| Catering and Supplies | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 300 |
| Legal Fees | | | | 250 | | | | 100 | | | | 250 | 600 |
| Brokerage Account | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 |
| Professional Fees/Accounting | | | 50 | | | | 75 | | | 50 | | 150 | 325 |
| Books and Subscriptions | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 240 |
| Truck Maintenance | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 1,200 |
| Equipment Rental & Maintenance | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 |
| Meeting Expenses | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 25 | 300 |
| Furniture Refurbish Supplies | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 |
| Home Cleaning Supplies | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 |
| Depreciation | 175 | 175 | 175 | 175 | 175 | 175 | 175 | 175 | 175 | 175 | 175 | 175 | 2,100 |
| Total Expenses | \$3,430 | \$3,430 | \$3,580 | \$3,690 | \$3,485 | \$3,785 | \$3,860 | \$3,885 | \$3,760 | \$3,710 | \$3,485 | \$3,900 | \$44,000 |

Balance Sheet
12/31/2018*
M.U.M. Made Up Mind, Inc.

ASSETS

| | | |
|------------------------------|-----------------|----------|
| Current Assets | | |
| Checking | \$67 | |
| Total Checking | <u>\$67</u> | |
| Accounts Receivable | \$0 | |
| Grants Receivable | \$0 | |
| Total Accounts Receivable | <u>\$0</u> | |
| Other Current Assets | | |
| PrePaid Insurance | \$45 | |
| PrePaid Rent | \$1,350 | |
| Total Other Current Assets | <u>\$45</u> | |
| Total Current Assets | <u>\$1,462</u> | |
| Fixed Assets | | |
| Truck | \$10,500 | |
| Accumulated Depreciation | \$1,750 | |
| Total Fixed Assets | <u>\$8,750</u> | |
| TOTAL ASSETS | <u></u> | \$10,212 |
| LIABILITIES AND EQUITY | | |
| Current Liabilities | \$0 | |
| Accounts Payable | \$1,350 | |
| Total Accounts Payable | <u>\$1,350</u> | |
| Long Term Liabilities | \$0 | |
| Total Liabilities | <u>\$1,350</u> | \$1,350 |
| EQUITY | | |
| Equity Earned | \$8,795 | |
| Net Income | \$67 | |
| Total Equity | <u>\$8,862</u> | \$8,862 |
| Total Liabilities and Equity | <u>\$10,212</u> | \$10,212 |

*Unaudited



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Middle Way House, Inc.

Address: 338 South Washington Street, Bloomington, IN 47401

Phone: 812-333-7404

E-Mail: grantsmanager@middlewayhouse.org

Website: <http://www.middlewayhouse.org>

President of Board of Directors: Kathleen Sideli

Name of Executive Director: Debra Morrow

Phone: 812-333-7404

E-Mail: debramorrow@middlewayhouse.org

Name and Title of Person to Present Proposal to the Committee:

Phone: Lauren Fox, Facilities Manager, and Debra Morrow, Executive Director

E-Mail: laurenfox@middlewayhouse.org, debramorrow@middlewayhouse.org

Name of Grant Writer: Rene Llewellyn

Phone: 812-333-7404

E-Mail: grantsmanager@middlewayhouse.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 26 | 42 | >200 |

AGENCY 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's mission is to end both structural and interpersonal violence. Middle Way House envisions a community where individuals live free from violence and the threat of violence; a community characterized by equality across the gender spectrum and social and economic justice; a community where everyone's contribution is honored and individual and group differences are valued; a community where everyone is adequately fed, housed, educated and employed; a community that provides opportunities for meaningful participation, personal growth, and creative expression.

PROJECT INFORMATION

Project Name: Middle Way House Safety and Accessibility Upgrades

Total cost of project: \$7,470.00

Requested amount of JHSSF funding: \$7,470.00

Total number of City residents anticipated to be served by this project in 2019: 630

Total number of clients anticipated to be served by this project in 2019: 1,050

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Middle Way House is requesting \$5,470 to purchase four automated external defibrillators (AEDs) and accessories for our Child Care, Administration, Emergency Shelter and Transitional Housing Programs. Having AEDs onsite will strengthen the chain of survival for our staff, residents, tenants, volunteers and clients.

An AED is an electronic device designed to deliver an electric shock to victim of sudden cardiac arrest. Ventricular fibrillation may be restored to normal rhythm up to 60 percent of the time if treated with an AED.

Middle Way House also requests \$2,000 to purchase four ADA Compliant Guest Room Kits for deaf or hard of hearing residents. Per the Americans with Disabilities Act guidelines, shelters must provide "effective communication" options. Each kit includes a teletypewriter (TTY), door knock sensor, telephone amplifier, telephone signaler, and an alarm clock with bed shaker for vibrating wake-up alarms to ensure optimal communication with hearing-impaired survivors.

In total, Middle Way House requests \$7,470 in Jack Hopkins Social Services Grant funding to provide our emergency shelter and transitional housing facilities with critical tools that will benefit the health and safety of our residents.

Addresses where project will be housed:

320, 338, and 401 South Washington Street, 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 to capital improvements to real estate and if you do not own the property at which the project 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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*): Donations budgeted for facility operations funding will pay for ongoing upkeep of AED units, including annual inspections, battery tests, and pad replacements.

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds: Post-award, equipment will be purchased from vendors based on estimates provided at time of grant application submission (see attached) in July-August, 2019. The agency will submit a claim voucher documenting all expenditures no later than September 30, 2019.

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 provision of physical emergency safety equipment and communication tools will demonstrate the agency's dedication to serving all survivors, including those living with addictions and disabilities, both underserved populations at increased risk for domestic violence and sexual assault. We believe this project will lead to increased awareness of our services in these underserved populations and allow us to build connections with other agencies, grantors, and volunteers invested in direct service at the intersection of disability, addiction, and survival of violence (including physical, sexual and human trafficking).

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|--|-------------------|
| Priority #1 | 4 automated external defibrillators (AEDs) and accessories | \$5,470.00 |
| Priority #2 | 4 ADA Compliant Guest Room Kits for deaf or hard of hearing residents | \$2,000.00 |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$7,470.00 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

This proposed project will directly benefit homeless families, especially women and their children, in need of emergency shelter as a consequence of experiencing violence in the home. Elders and survivors living with opioid addictions are at increased risk for cardiac arrest and on-site AEDs will significantly improve survival rates for these especially vulnerable individuals at Middle Way House and The Rise. ADA-compliant room kits will benefit deaf and hard-of-hearing survivors, providing them with tools for optimal communication with shelter and transitional housing staff.

The City's Consolidated Plan 2015-2019, the Homelessness Strategy (91.215(d) pg. 104) states that the City of Bloomington will continue to support efforts that address emergency and transitional housing needs for "victims of domestic violence." Further, the South Central Housing Network's Heading Home: A Regional Plan to Make Homelessness Rare, Brief & Nonrepeating report's strategies include using Transitional Housing strategically to focus on survivors of domestic violence.

MWH is an active participant in the City's Anti-Poverty Strategy (92.215 (j) pg. 108), providing Essentials (self-sufficiency programs, case management, appropriate counseling referrals), Education (life-skills development, support for raising clients' education attainment levels) and Assistance to Increase Earnings (pre-employment training and job placement assistance).

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

Our project involves a one-time purchase of physical equipment to improve services and address safety concerns for Middle Way House clients.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Installing AEDs in our facilities may help save a client, staff, or volunteer's life while they are at Middle Way House. AEDs save precious treatment time and improve survival odds when used before emergency medical service (EMS) personnel arrive. Each year EMS treats nearly 300,000 people who suffer cardiac arrest outside of the hospital. More than 92 percent of cardiac arrest victims don't survive. In cases where defibrillation is provided within 5-7 minutes, the survival rate is as high as 45 percent.

To provide the best care for individuals who actively use opioids, AEDs are crucial. MWH keeps stock of Narcan to assist in any on-site overdoses; however, overdoses can result in sudden cardiac arrest and require immediate use of an AED.

The provision of Americans with Disabilities Act compliant kits for deaf and hard-of-hearing clients in residence at our emergency shelter or transitional housing facilities ensures safe and effective communication between clients and staff, particularly in emergency situations. The CDC (2017) reports that approximately 3.9% of Hoosiers 18 or older have a hearing disability.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

In 2018 our agency served 11 hearing-impaired clients and the need for ADA Compliant kits became evident. We anticipate serving at least as many clients in 2019 who will benefit from use of the kits to improve the quality of their service experience at Middle Way House.

Regarding the ADAs, of course we hope that there will never be an instance in which they are required. Their installation in our facility is a case of adhering to best practices for shelter and residential health and safety, as outlined by the Indiana Coalition Against Domestic Violence and national shelter programs. All residents, staff, volunteers, and visitors (more than 1,770 individuals in 2018) to our agency will benefit indirectly and potentially directly from the presence of these life-saving devices.

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.

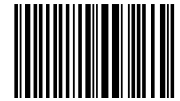
MWH PROJECT BUDGET 2019 – JACK HOPKINS GRANT PROGRAM

| Project Portion | Item | Estimated Cost | Actual Cost |
|---|--|-------------------|-------------|
| Agency-wide Health & Safety | 4 automated external defibrillators (AEDs) and accessories | \$5,470.00 | TBD |
| Underserved Populations Health & Safety | 4 ADA Compliant Guest Room Kits for deaf or hard of hearing residents | \$2,000.00 | TBD |
| Cost Subtotal: | | \$7,470.00 | |
| Total Jack Hopkins Grant Award: | | \$7,470.00 | |



1800 US Hwy 51 N
Woodruff, WI 54568
Phone: 800-691-6459
Fax: 800-996-0972

Middle Way House
QUOTE



| CUST ID | DATE | QUOTE # |
|---------|-----------|---------|
| 308814 | 3/26/2019 | 148098 |

| | |
|---|---------------------|
| PREPARED FOR: | 812-333-7404 |
| Lauren Fox Middle Way House 338 S. Washington St. Bloomington IN 47401 | |

| | |
|--|---------------------|
| SHIP TO | 812-333-7404 |
| Lauren Fox Middle Way House 338 S Washington St Bloomington IN 47401-3529 | |

| | | | | | |
|--------------|----------|-------------|--|------------|----------------|
| Shipped via: | Standard | Fax Number: | | Reference: | Lifeline-Fully |
|--------------|----------|-------------|--|------------|----------------|

| Item | Description | Quantity | Current Price | Your Price | Total |
|---------------|---|----------|-----------------------|------------|------------|
| DDP-100 | Adult Defibrillation Electrode Pads for the Defibtech (Lifeline or ReviverR) AED | 4 | \$38.00 | \$30.04 | \$120.16 |
| DDP-200P | Pediatric Defibrillation Electrode Pads for the Defibtech (Lifeline or ReviverR) AED | 4 | \$99.00 | \$79.20 | \$316.80 |
| SVP-DTAUTO7-A | Defibtech Lifeline Fully-Automatic AED School & Community Value Package. Includes: - Defibtech Lifeline Fully-Automatic AED - 8 Year Warranty - Adult Electrode Pads - 7 Year Long-Life Battery - 9 Volt Battery for Self Checks - Operator's Instruction Manual - Unit Overview Video - Responder® Wall Cabinet w/Alarm - Infant/Child Electrode Pads - Soft Carry Case - Responder® Premium AED/CPR Pack - Responder® AED Flexible Wall Sign - Unit Overview Video - AED Check Inspection Tag - AED Window/Wall Decal | 4 | \$1,524.00 | \$1,258.20 | \$5,032.80 |
| Free Gift | AED Superstore Responder CPR Barrier Keychain | 1 | \$4.99 | \$0.00 | \$0.00 |

FREE Responder Keychain™ included with this order, compliments of your AED Superstore®

| | |
|-----------------------|-------------------|
| Subtotal | \$5,469.76 |
| Shipping | FREE |
| Sales Tax | \$0.00 |
| Estimate Total | \$5,469.76 |

Estimate valid for 30 days from above date.
All items listed above are covered under our 30 Day Money Back Guarantee!



PROUD SUPPLIER TO THE US GOVERNMENT
 GSA/VA Contract Number: V797D-50533
 Contract Expiration Date: 02/14/2021
 DUNS #: 121 306 984
 CAGE Code: 3DHR2
 FEIN/TIN: 27-0005083
 Business Size Classification: Large

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[Home](#) / [ADA Compliant Guest Room Kit 500A Hard Case](#)



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MORE VIEWS



ADA Compliant Guest Room Kit 500A Hard Case

SKU: ADA-500A

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[Be the first to review this product](#)

[Twitter](#) [Facebook](#) [Email](#) [Pinterest](#) [+1](#)

Availability: In stock

\$489.00

As low as \$44 a month. [Learn More](#)

Quick Overview

The products in this ADA compliant 500 kit version were selected to meet the budget allowances of hotels, hospitals and nursing homes. It includes a TTY, door knock sensor, telephone amplifier, telephone signaler, alarm clock with bed shaker for vibrating wake-up alarms, ADA sign and a hard carrying case.

[Product Description](#) [Additional Information](#) [Accessories](#) [We Also Recommend](#) [Product Reviews](#)

| | |
|--------------------|---------|
| Brand | Harris |
| Flat Shipping Rate | \$25.00 |
| Product Type | ADA |
| Restocking Fee | \$10.00 |

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MORE VIEWS



ADA Compliant Guest Room Kit 500A Hard Case

SKU: ADA-500A

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Quick Overview

The products in this ADA compliant 500 kit version were selected to meet the budget allowances of hotels, hospitals and nursing homes. It includes a TTY, door knock sensor, telephone amplifier, telephone signaler, alarm clock with bed shaker for vibrating wake-up alarms, ADA sign and a hard carrying case.

[Product Description](#) [Additional Information](#) [Accessories](#) [We Also Recommend](#) [Product Reviews](#)

The products in this kit were selected to meet the hospitality industry's budget allowances. This kit is for a room in a hotel, hospital or nursing home. Save by purchasing this kit!

It doesn't have to be complicated or expensive for your facility to be in compliance with the Americans with Disabilities Act (ADA). Other kit combinations are available for your guests who are deaf or hard of hearing, or call or email us about customized options. Find out how many kits you need to make your establishment [compliant with ADA regulations](#).

A \$25 shipping/handling charge for ground delivery will be added for each kit for orders in the contiguous US. Please call customer service at 1-800-825-6758 or email at info@harriscomm.com for quotes for Hawaii, Alaska, Puerto Rico or for express delivery options. There is a \$10 restocking fee for each returned ADA kit.

Includes:

- TTY (Text Telephone) (UTI-MC4)
- Door Knock Sensor (HC-DK125)
- Telephone Handset Amplifier (AMER-HA40)
- Krown Phone Strobe Flasher (KM-PSF)
- Alarm Clock (SA-SB200SS)
- Assistive Listening Devices available sign (ADA-SIGN)
- Hard Carrying Case

Are you a small business with less than 30 full-time employees or gross receipts less than \$1 million/year? Read more about eligibility and receive a Disabled Access Credit (DAC), a tax incentive to encourage small businesses to comply with the ADA. Go to <http://askjan.org/media/tax.html> Internal Revenue Service office: <http://www.irs.gov/businesses>.

Have a Question?

[Click Here to Chat!](#)

Middle Way House Inc
Profit & Loss
 January through December 2018

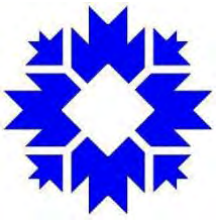
| | Jan - Dec 18 |
|--|--------------|
| Ordinary Income/Expense | |
| Income | |
| 400000 · Grants | 1,133,936.14 |
| 402000 · Foodworks Auction | 500.00 |
| 403000 · Contributions Income | |
| Cars Donated | 2,500.00 |
| 4001.00 · Donations - MWH | |
| 4270AD · Unrestricted | 871.82 |
| 4001.00 · Donations - MWH - Other | 219,627.16 |
| | 220,498.98 |
| Total 4001.00 · Donations - MWH | |
| 4210AD · United Way | 42,837.79 |
| 422500 · Restricted | |
| 422700 · Foundations & Awards | 41,893.67 |
| 423010 · Toby Strout VOICES Fund | 4,550.00 |
| 423015 · T Strout Ed & Infrastructure Fd | 15,000.00 |
| 4260AD · NAP Credits | 20,880.00 |
| | 82,323.67 |
| Total 422500 · Restricted | |
| Total 403000 · Contributions Income | 348,160.44 |
| 417000 · Program Fees | |
| 4370-AD · Childcare Fees | 17,613.50 |
| 417000 · Program Fees - Other | 200.00 |
| | 17,813.50 |
| Total 417000 · Program Fees | |
| 4220AD · Donated Services and Assets | 126,453.60 |
| 4380AD · Other Income | |
| 9720AD · Laundry (Rent) | 26.47 |
| 9740AD · Miscellaneous Income | 736.14 |
| 9750AD · Rental Income | 42,602.00 |
| 4380AD · Other Income - Other | 2,555.06 |
| | 45,919.67 |
| Total 4380AD · Other Income | |
| 4401AD · Fundraising | 142,833.84 |
| 950000 · Investment Income | |
| 9501AD · Dividends | 353.07 |
| 9502AD · Unrealized Gain/Loss on Invest | -1,053.90 |
| 9520AD · Interest | 4,306.35 |
| | 3,605.52 |
| Total 950000 · Investment Income | |
| Total Income | 1,819,222.71 |

Middle Way House Inc
Profit & Loss
 January through December 2018

| | Jan - Dec 18 |
|---|--------------|
| Gross Profit | 1,819,222.71 |
| Expense | |
| Merchant deposit fees | 357.05 |
| 502800 · Employee Appreciation | 960.93 |
| 5150AD · Automobile Expense | |
| 515500 · Other | 138.35 |
| 515600 · Fuel | 167.71 |
| 515700 · Repairs | 244.39 |
| | 550.45 |
| Total 5150AD · Automobile Expense | |
| 516000 · Bad Debts | 104.90 |
| 5170AD · Bank Service Charges | 1,785.46 |
| 519900 · Client Direct Assistance | 6,239.72 |
| 530000 · Compensation | |
| 500200 · Salaries and Wages | 1,167,970.24 |
| 5300AD · Payroll Taxes | 98,683.76 |
| 5350AD · Health Insurance/Benefits | 31,955.86 |
| 535500 · Workers Comp | 7,164.00 |
| 536000 · Workstudy/Interns | 283.40 |
| | 1,306,057.26 |
| Total 530000 · Compensation | |
| 5400AD · Contract Labor | 23,546.14 |
| 5410AD · Conferences | 1,012.10 |
| 5411AD · Training | 476.04 |
| 5600AD · Donated Services | 126,453.60 |
| 5700AD · Dues and Fees | 3,275.26 |
| 590600 · FDE Fundraising Direct Expense | 5,469.31 |
| 6000AD · Insurance | 60,473.21 |
| 6200AD · Miscellaneous | 399.96 |
| 6250AD · Foodworks Closure | 30,408.26 |
| 6300AD · Occupancy | |
| 5800AD · Equipment Rent and Maint | 34,839.88 |
| 6310AD · Transportation | 1,420.60 |
| 6320AD · Laundry | 724.25 |
| 6330AD · Food | 5,282.24 |
| 6335AD · Security | 5,828.30 |
| 6340AD · Building Repairs and Maint | 8,722.34 |
| 6350AD · Rent | 2,000.00 |
| 6360AD · Supplies | 1,693.27 |
| 6361AD · Trash Removal | 866.28 |
| 6370AD · Utilities | 47,966.72 |
| 6800AD · Telephone | 15,907.65 |
| | 15,907.65 |

Middle Way House Inc
Profit & Loss
 January through December 2018

| | Jan - Dec 18 |
|---|--------------|
| Total 6300AD · Occupancy | 125,251.53 |
| 635000 · Travel & Ent | |
| 6905AD · Conference Registration | 1,568.00 |
| 6910AD · Meals | 218.47 |
| 6940AD · Program travel | 2,379.00 |
| 6946AD · Mileage | 3,883.12 |
| 635000 · Travel & Ent - Other | 901.14 |
| | 8,949.73 |
| Total 635000 · Travel & Ent | |
| 6390AD · Penalties | 816.02 |
| 6400AD · Postage and Delivery | 4,870.35 |
| 6450AD · Printing and Reproduction | 27,295.47 |
| 6500AD · Professional Fees | |
| 6501AD · Audit | 38,475.00 |
| 6510AD · Accounting | 1,500.00 |
| 6520AD · Computer hardware/software | 12,561.45 |
| 6525AD · Consulting | 18,870.00 |
| 6500AD · Professional Fees - Other | 669.20 |
| | 72,075.65 |
| Total 6500AD · Professional Fees | |
| 6600AD · Supplies | |
| Software | 11,005.68 |
| 6610AD · Program | 4,120.48 |
| 6620AD · Office | 16,202.02 |
| 6630AD · Office Equipment | 779.97 |
| 6600AD · Supplies - Other | 1,403.71 |
| | 33,511.86 |
| Total 6600AD · Supplies | |
| 6700AD · Subscriptions and Publications | 678.20 |
| | 1,841,018.46 |
| Total Expense | |
| Net Ordinary Income | -21,795.75 |
| Other Income/Expense | |
| Other Expense | |
| 542500 · Depreciation Expense | 156,030.00 |
| 542501 · Amortization Expense | 216.00 |
| | 156,246.00 |
| Total Other Expense | |
| Net Other Income | -156,246.00 |
| Net Income | -178,041.75 |



CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION

AGENCY CONTACT INFORMATION

Lead Agency Name: Monroe County Humane Association

Address: PO Box 1334, Bloomington, Indiana 47402

Phone: 812-333-6242

E-Mail: mcha@monroehumane.org

Website: www.monroehumane.org

President of Board of Directors: Stacy Bridavsky

Name of Executive Director: Rebecca Warren

Phone: 812-333-6242, ext 101

E-Mail: rwarren@monroehumane.org

Name and Title of Person to Present Proposal to the Committee: Rebecca Warren, Executive Director

Phone: 812-333-6242, ext 101

E-Mail: rwarren@monroehumane.org

Name of Grant Writer: Rebecca Warren, Executive Director

Phone: 812-333-6242, ext 101

E-Mail: rwarren@monroehumane.org

AGENCY INFORMATION

Lead Agency: Monroe County Humane Association

Is Lead Agency a 501(c)(3)? [**X**] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 5 | 6 | 50+ |

AGENCY 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.

MCHA is dedicated to promoting the welfare of animals, strengthening the human-animal bond, and providing access to accessible veterinary care and humane education across our community.

To accomplish our mission, we provide:

- Direct veterinary services to help animals and animal owners;
- A thorough humane education platform that reaches youth and adults across the community;
- Volunteer animal therapy teams sharing the benefits of the human-animal bond;
- Resources and trap-neuter-return assistance for caretakers of feral or outdoor cats;
- Facilitate emergency foster, temporary housing and disaster response;
- A pet food and supply pantry with free or very low-cost pet food, treats, supplies, and care items;
- Veterinary care sponsorship for extreme injury/illness veterinary care and the prevention of accidental litters

PROJECT INFORMATION

Project Name: Emergency Housing Facility

Total cost of project: \$100,000.00

Requested amount of JHSSF funding: \$100,000.00

Total number of City residents anticipated to be served by this project in 2019: 50+

Total number of clients anticipated to be served by this project in 2019: 50+

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

We are requesting \$100,000 to support the construction of an Emergency Housing facility. The 800 square foot specialty facility will be new construction on MCHA property allowing housing for up to twelve dogs, crate storage, and both animal care and exam space. As the designated response partner for both Homeland Security and Monroe County Emergency Services for animal services, the operation of an Emergency Housing facility is imperative to both our current emergency housing program and our ability to appropriately coordinate care in the event of a local disaster.

Address where project will be housed: 791 S. Fieldstone Blvd, 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 to capital improvements to real estate and if you do not own the property at which the project 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.*

In January of 2019, MCHA purchased all four lots at the northwest corner of Kirby Rd and Fieldstone Boulevard. The property will house an Animal Care Campus, built in phases. We are currently building phase one of construction, housing a full-service nonprofit Veterinary Clinic. MCHA intends to utilize the Jack Hopkins grant to build phase two, the Emergency Housing Facility, which is an extended stay, emergency response and housing center.

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.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

While we have no formal collaborative partner to facilitate this grant, this initiative will directly support the current cooperative relationship between MCHA, Homeland Security, Monroe County Emergency Services and several other nonprofit agencies. Currently, MCHA works closely with the Shalom Center, Stepping Stones, Middle Way House, the Red Cross, and both city and county animal control officers to coordinate emergency housing for animals in the event that a family has to seek housing or shelter and cannot take their pet with them. With each of these organizations, MCHA has facilitated short-term emergency housing for shared clients due to extreme weather conditions, domestic violence, fire, and extended medical stays.

PROJECT COSTS

Is this request for operational funds? Yes No

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

- Pilot
- Bridge
- Collaborative
- None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending)*: There are no additional proposals in place to fund the construction of this facility. Once the facility is operational, grant funding becomes available through national grant opportunities to fund any costs associated with emergency housing.

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds: Plans for construction will begin immediately after grant funds have been approved. As construction draws require, MCHA will submit requests for disbursement or reimbursement from grant funding.

If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received: There is no additional 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.

The Emergency Housing program will create additional opportunities for on-site volunteers seeking hands-on animal care roles. The on-site, dedicated facility will allow MCHA to expand our housing services to our current partners seeking to provide supportive services to families with pets. MCHA will also become eligible for additional grant opportunities to support the operating costs of emergency housing programs. In-kind donations of pet food, care and supply items will directly support this program.

FUNDING PRIORITIES -- RANKED

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

Yes No

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

| | Item | Cost |
|------------------------|------------------------------|--------------------|
| Priority #1 | Building Construction | \$80,000.00 |
| Priority #2 | Kennel Construction | \$20,000.00 |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Temporary housing and sheltering are a previously identified priority for our community, however, there are even fewer opportunities for co-housing for families with pets. Many families with pets will not leave their situation if they cannot either leave with their pet or have safe placement for their pet that offers reunification. Two-thirds of American households have pets, meaning in any local disaster, there will be a significant number of families with pet related needs seeking housing. Studies show as many as 48 percent of domestic violence victims may put off leaving their abusers out of fear for their pets' safety. Creating an Emergency Housing facility will meet these current unmet needs of our community by creating a shelter that is dedicated to pet reunification for families with pets. The Emergency Housing shelter will operate as a first phase housing center in any disaster response, then coordinating to a larger, temporary shelter onsite. Without this facility as a response center, there is nowhere to coordinate the efforts for a local disaster or a 24/7 facility offering a safe haven for pets of those that find themselves in need of emergency housing due to domestic violence, fire, or extreme weather.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

MCHA is seeking the one-time costs to support the construction of the building to house the Emergency Housing Facility on MCHA property.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

The Emergency Housing facility is a permanent and life-long investment into an animal friendly community that knows and believes how important pets are. There are currently no co-housing or low-cost boarding opportunities for families with pets in the event of a personal emergency, medical stay or local disaster. This permanent facility will be dedicated to families with pets that cannot afford traditional boarding opportunities or the costs associated with a pet friendly hotel. All MCHA programs and services directly support a life-long pet-owner relationship. Current city shelter housing requires relinquishment of the pet or housing for a maximum of four days before the pet becomes property of the city shelter. If a pet is reclaimed within four days, a multitude of fees associated with housing are applied. The Emergency Housing facility will be able to offer both short and extended housing options for low or no costs associated to families for years to come. The facility will be part of the Monroe County Humane Association Animal Care Campus, dedicated to providing services towards a lifelong, healthy and responsible pet-owner relationship.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

For families seeking emergency housing due to personal related emergencies, MCHA seeks to maintain a reunification rate of 95%.

In the event of a local disaster, the Emergency Housing center would become the primary response center for animal intake and housing for both local emergency responders and volunteers. There is currently no other declared emergency shelter for pets in the event of a local disaster.

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.

About Emergency Housing:

In 2018, MCHA housed 34 animals for emergency housing, all but three animals were reunited with their owners. MCHA offered emergency housing to families suffering through domestic violence, homelessness, fire, and personal extended medical stays. Without emergency housing through MCHA, these animals could have been unnecessarily surrendered. Emergency housing was coordinated on-site in the non-profit veterinary clinic out of a bank of five cages. Housing conditions required staff to come in multiple times per day to walk and relieve animals. Due to limited space on-site, the conditions also significantly limited our ability to offer emergency housing, or required us to refuse animals for housing due to available space. The facility also operates and houses animals for daily medical care, grooming or surgery related care. At high-volume, animals would be housed in all five cages and up to five crates distributed throughout the clinic spaces.

About the *proposed* Emergency Housing Facility:

The demand for housing has only continued to increase, requiring the construction of a new Emergency Housing facility that will allow us to house up to 12 animals at once, providing space for either emergency housing for the public or our community partners, or to serve as an on-site emergency response shelter in the case of a small, local disaster that displaces families and pets such as a tornado, flood or fire. The facility will allow animals to have free indoor-outdoor access, drastically improving animal conditions for extended stays. The facility will also have a separate entrance, allowing volunteers to more easily come and care for the animals in housing, reducing the demand on staff. Security measures in the facility will allow all-hours availability for dedicated emergency response partners.

Premier General Concrating

MyCompany2
1203 South Seminary St
Bloomfield IN 47424
Tel: 812-227-0959

QUOTE

Date: 4/1/19
To: Rebecca Warren
Company: MCHA
Project: Emergency Housing Facility
Location: 791 South Fieldstone Blvd
Description: ProjectDescription

New construction on an Emergency Housing facility at 800square foot. Specialty facility will be new construction on MCHA property allowing housing for up to twelve dogs, crate storage, and both animal care and exam space

General

Building permit

Subtotal General

Sitework

Foundation excavation
Foundation backfill and compaction
Base course, stone, 4 in thick
Paving, concrete, 4 in thick, no reinf

Subtotal Sitework

WoodPlastics

Stud wall, 2" x 4", 8 Ft high, 16" oc
Stud wall, 2" x 6", 8 Ft high, 16" oc
Wall sheathing, interior grade, 1/2" thick
Roof sheathing, exterior grade, 3/8" thick

Fink truss, conventional, 30 ft span
Countertop, plastic lam, 24" with splash

Subtotal WoodPlastics

ThermalMoisture

Building wrap, tyvek, heavy
Batt insulation, 6", kraft face, R-19
Blown fiberglass insulation, 12" thick, R-26
Roofing felt, 30#
Asphalt shingles, 30-year
Vinyl siding
Fascia, sheet metal, prefinished
Gutter, aluminum, 5"
Downspout, aluminum, 4" dia

Subtotal ThermalMoisture

DoorsWindows

Wood door frame, interior, 3'-0"x6'-8"
Wood door frame, exterior, 3'-0"x7'-0"
Vinyl window, double hung, 42"x60"
Door closer, interior
Door closer, exterior
Lockset, kobs

Subtotal DoorsWindows

Finishes

Drywall, 5/8", ceiling, incl tape & finish
Drywall, 5/8", walls, incl tape & finish
Concrete floor sealing, basic system

Subtotal Finishes

Specialties

Waste receptacle, surface mounted
Toilet tissue dispenser, SS, recessed
Towel dispenser, SS, surface mounted
Mirror, SS frame, 18"x30"

Subtotal Specialties

Furnishings

Custom wood cabinets, base
Custom wood cabinets, wall
Specialy Equipment, Kennels

Subtotal Furnishings

Mechanical

PLUMBING
HEATING, VENTILATING, AIR CONDITIONING

Subtotal Mechanical

Electrical
Electrical

Subtotal Electrical

Estimate Total

Terms and Conditions:

1. Scope of Work. Contractor agrees to furnish all labor, services, materials, installation, supplies, insurance, equipment, tools and other facilities needed for the prompt and efficient execution of the work described herein in a professional manner.
2. Quote Amount. Owner agrees to pay Contractor for the strict performance of his work, the sum as indicated above subject to additions and deductions for changes in the scope of work as may be subsequently agreed upon.
3. Payment Schedule. Owner agrees to pay Contractor in progress payments as follows:

Payment #1 - Upon start of project.

Payment #2 - Upon 40% completion.

Payment #3 - Upon 60% completion.

Payment #4 - Upon 80% completion.

Payment #5 - Upon 100% completion.

4. Work Schedule. Contractor shall complete the work as required by the work schedule prepared by the Contractor, which is agreed to be no more than:

<90 days>

from the start date of the project. Work schedule may be amended based on additional work inclusions and deductions and by agreement between the Owner and Contractor.

The parties hereto have executed this Agreement for themselves, their heirs, executors, successors, administrators, and assignees on the day and year written below.

Signed By: Contractor

Kent Kimmel
Owner
Premier General Concrarting
Kent Kimmel
Date _____

Accepted By: Owner
Rebecca Warren
Date _____

\$

600.00
600.00

364.00
155.64
693.36
1,957.41
3,170.41

1,153.80
3,957.20
2,715.60
2,980.00

8,137.36
545.10
19,489.06

260.40
1,450.80
1,216.00
880.00
4,160.00
3,447.20
1,971.20
791.20
282.56
14,459.36

1,240.80
478.25
3,226.24
601.60
215.38
438.00
6,200.27

904.00
2,163.20
912.00
3,979.20

129.53
108.54
97.19
239.45
574.71

3,693.60
3,573.75
20,000.00
27,267.35

6,500.00
9,600.00
16,100.00

11,200.00
11,200.00

103,040.36



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

Monroe County Humane Association

In reply refer to: 0248145604
Dec. 07, 2009 LTR 4168C E0
35-6064277 000000 00

00015531

BODC: TE

HUMANE ASSOCIATION INC OF MONROE
COUNTY
PO BOX 1334
BLOOMINGTON IN 47402-1334



038910

Employer Identification Number: 35-6064277
Person to Contact: Jeffery Cordell
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Nov. 25, 2009, request for information regarding your tax-exempt status.

Our records indicate that your organization was recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in May 1971.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Beginning with the organization's sixth taxable year and all succeeding years, it must meet one of the public support tests under section 170(b)(1)(A)(vi) or section 509(a)(2) as reported on Schedule A of the Form 990. If your organization does not meet the public support test for two consecutive years, it is required to file Form 990-PF, Return of Private Foundation, for the second tax year that the organization failed to meet the support test and will be reclassified as a private foundation.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

MCHA Monroe County Humane Association

BALANCE SHEET As of December 31, 2018

| | TOTAL |
|-----------------------------------|-----------------------|
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| BACC Savings Account | 3,909.47 |
| BACC Shelter Fund-GAB Checking - | 260.86 |
| Gabi Checking | 0.00 |
| IU Credit Union Money Market | 262,154.17 |
| MCHA Money Market 9408 | 222,177.89 |
| MCHA OPERATING- Checking | 58,740.83 |
| MCHA Savings Account | 0.00 |
| MCHA_ CD Account | 0.00 |
| Total Bank Accounts | \$547,243.22 |
| Other Current Assets | |
| 1300 Endowment | |
| 1310 Cash Equivalents | 64,525.38 |
| 1330 Common Stocks and ETF's | 998,233.66 |
| 1340 Mutual Funds | 8,619.52 |
| 1350 Bonds | 243,139.60 |
| Total 1300 Endowment | 1,314,518.16 |
| 1499 Undeposited Funds | 0.00 |
| Petty Cash | 50.00 |
| Uncategorized Asset | 0.00 |
| Total Other Current Assets | \$1,314,568.16 |
| Total Current Assets | \$1,861,811.38 |
| Other Assets | |
| 1810 Theodore Appleton Fund | 36,657.01 |
| 1820 Branch Endowment | 210,925.74 |
| 1830 MCHA Fund | 54,761.65 |
| Suspense | 5,354.90 |
| Total Other Assets | \$307,699.30 |
| TOTAL ASSETS | \$2,169,510.68 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Credit Cards | |
| Bank of America Credit Card | 0.00 |
| German American_Credit CardX3 | 1,999.49 |
| Total Credit Cards | \$1,999.49 |
| Other Current Liabilities | |
| 2100 PAYROLL LIABILITIES | 0.00 |
| Employee Medicare | 0.00 |
| Employee Social Security | 0.00 |
| Employer Medicare | 0.00 |

Monroe County Humane Association
TOTAL

| | |
|--|-----------------------|
| Employer Social Security | 0.00 |
| Federal Income Tax W/H | 0.00 |
| Fica & Fed Payable | 0.00 |
| Local Tax | 0.00 |
| Retirement-Employee Cont. | 0.00 |
| Retirement-Employer Cont. | 0.00 |
| Simple IRA Payable | -33.73 |
| State & County Payable | 0.00 |
| State Tax | 0.00 |
| Total 2100 PAYROLL LIABILITIES | -33.73 |
| Total Other Current Liabilities | \$ -33.73 |
| Total Current Liabilities | \$1,965.76 |
| Total Liabilities | \$1,965.76 |
| Equity | |
| 3000 Opening Bal Equity | 0.00 |
| 3300 Permanently Restreiced Net Assets | 302,344.40 |
| 3900 Unrestricted Net Assets | 480,973.54 |
| Net Income | 1,384,226.98 |
| Total Equity | \$2,167,544.92 |
| TOTAL LIABILITIES AND EQUITY | \$2,169,510.68 |

MCHA Monroe County Humane Association

PROFIT AND LOSS

January - December 2018

| | TOTAL |
|--|-------------------|
| Income | |
| Billable Expense Income | 500.00 |
| CAP01 Capital Improvements Fund | 75,948.62 |
| FR5000 Annual Fund Income | |
| 5700 CORPORATE SPONSORS | 10,213.00 |
| FR5200 Run for the Animals | |
| FR5202 Barktoberfest | 2,574.62 |
| FR5203 Registration | 4,655.63 |
| Total FR5200 Run for the Animals | 7,230.25 |
| FR5400 Tails on The Town | |
| FR5403 TOTT Event Income | 23,088.89 |
| FR5405 Fund-an-Item | 21,166.20 |
| FR5407 Ticket Sales/Income | 13,206.60 |
| Total FR5400 Tails on The Town | 57,461.69 |
| FR5500 Direct Mail | 55,018.00 |
| FR5600 MINI EVENTS | 11,816.11 |
| FR5601 Third Party Benefits | 11,331.41 |
| Total FR5600 MINI EVENTS | 23,147.52 |
| Total FR5000 Annual Fund Income | 153,070.46 |
| GR1000 GRANTS | 8,693.20 |
| PR4000 PROGRAMMING | |
| PR4100 EDUCATION | |
| PR4102 Kids Camp Registration | 10,084.73 |
| PR4104 Ed Program Fee/Donations | 380.54 |
| PR4105 Pet Tech Service/Fee Income | 1,669.15 |
| Workshop Income | 4,810.02 |
| Total PR4100 EDUCATION | 16,944.44 |
| PR4200 VIPaws | |
| PR4202 Fees/Evaluations | 826.00 |
| PR4203 Training Workshops / Donations | 573.13 |
| Total PR4200 VIPaws | 1,399.13 |
| Total PR4000 PROGRAMMING | 18,343.57 |
| SV3000 SERVICES | |
| Pantry | 2,966.00 |
| SV3102 CLINIC DONATIONS | 520.11 |
| Medical Sponsors | 5,370.00 |
| Total SV3102 CLINIC DONATIONS | 5,890.11 |
| SV3201 CLINIC SERVICES | 193,609.26 |
| Online Pharmacy Income | 4,238.75 |
| Total SV3201 CLINIC SERVICES | 197,848.01 |
| SV3301 SN Donations | 35.00 |

Monroe County Humane Association

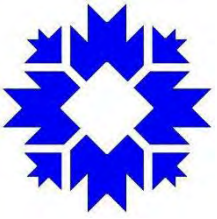
| | TOTAL |
|---|-----------------------|
| SV3400 Community Cat Donations | 120.00 |
| Total SV3000 SERVICES | 206,859.12 |
| UN2000 Unsolicited Income | 13,410.11 |
| UN2101 Restricted Donation - Endowment | 1,314,518.16 |
| UN2102 Matching Gift | 1,003.01 |
| UN2103 Memoriam/Honorarium | 8,737.00 |
| UN2104 Network for Good | 9,794.99 |
| UN2105 Donation Can (deleted) | 180.77 |
| UN2400 Monthly Giving Program | 4,761.69 |
| United Way / Community Foundation | 15,045.07 |
| Total UN2000 Unsolicited Income | 1,367,450.80 |
| Uncategorized Income | 20.00 |
| Total Income | \$1,830,885.77 |
| GROSS PROFIT | \$1,830,885.77 |
| Expenses | |
| 4200 PROGRAMMING EXPENSES | |
| EDUCATION | |
| Animal Care | 1,591.05 |
| Pet Tech /Supplies & Materials | 227.30 |
| Supplies | 2,808.58 |
| Workshop Host Expenses | 1,768.64 |
| Total EDUCATION | 6,395.57 |
| VIPaws Expenses | |
| Supplies | 150.60 |
| Total VIPaws Expenses | 150.60 |
| Total 4200 PROGRAMMING EXPENSES | 6,546.17 |
| 4400 FUNDRAISING EXPENSE | |
| Booth Fees | 100.00 |
| Direct Mail | |
| FR5502 Fundraising Services | 3,750.00 |
| FR5504 Fundraising Data Proc/Printing | 5,677.80 |
| FR5508 Fundraising Postage | 953.23 |
| Total Direct Mail | 10,381.03 |
| Event, General | 1,070.98 |
| Run for the Animals | |
| EVENT | 1,621.50 |
| Supplies | 455.68 |
| Total Run for the Animals | 2,077.18 |
| Supplies | 538.54 |
| Tails on the Town | |
| Event Costs | 19,157.57 |
| SUPPLIES | 599.92 |
| Total Tails on the Town | 19,757.49 |
| Total 4400 FUNDRAISING EXPENSE | 33,925.22 |
| BACC Reimbursements | 511.00 |
| GRANT EXPENSES | 5,798.68 |
| Operation Expense | 4,258.18 |

Monroe County Humane Association

| | TOTAL |
|------------------------------------|---------------------|
| Advertising / Promotions | 2,509.52 |
| Auto Expense | 434.13 |
| Bank Fees | 32.73 |
| Board Expenses | 79.53 |
| Business Insurance | 7,566.00 |
| CEO Expenses | 44.59 |
| Credit Card Service Fees | 2,841.76 |
| Dues & Subscriptions | 9,176.71 |
| Facility | 614.81 |
| Building Expenses | 1,302.12 |
| Rent | 12,290.22 |
| Repair & Maintenance | 3,182.92 |
| Utilities | 3,735.86 |
| Total Facility | 21,125.93 |
| IT/Computer/Phone | 8,042.43 |
| Office Supplies | 6,330.24 |
| Payroll Expenses | 404.00 |
| Employee Insurance | 3,099.00 |
| Payroll Taxes | 15,861.77 |
| Retirement | 3,096.01 |
| Salary | 218,566.25 |
| Total Payroll Expenses | 241,027.03 |
| Postage | 1,060.44 |
| Professional Fees | 6,634.00 |
| Staff Development | 573.77 |
| Supplies | 359.12 |
| Travel | 1,564.05 |
| Total Operation Expense | 313,660.16 |
| QuickBooks Payments Fees | 41.77 |
| REFUND | 839.11 |
| SERVICES EXPENSES | |
| Community Cat Supplies | 80.00 |
| Grooming Expenses (deleted) | 2,612.20 |
| Med / Vax Clinic CODB | 71,302.91 |
| Online Pharmacy | 3,352.23 |
| Total Med / Vax Clinic CODB | 74,655.14 |
| MEDICAL FUND EXPENSES | 2,304.32 |
| OLIVIA FUND EXPENSES | 185.62 |
| Total MEDICAL FUND EXPENSES | 2,489.94 |
| Pantry Expenses | 576.81 |
| Retail | 96.82 |
| SNAP Program | |
| Community Cat / TNR | 1,255.00 |
| General | 5,930.00 |
| S/N Relinquishment Program | 560.00 |
| Total SNAP Program | 7,745.00 |
| Total SERVICES EXPENSES | 88,255.91 |
| Total Expenses | \$449,578.02 |

Monroe County Humane Association
TOTAL

| | |
|---------------------------|-----------------------|
| NET OPERATING INCOME | \$1,381,307.75 |
| Other Income | |
| BACC Income | 943.48 |
| Interest Income | 1,975.75 |
| Total Other Income | \$2,919.23 |
| NET OTHER INCOME | \$2,919.23 |
| NET INCOME | \$1,384,226.98 |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Monroe County United Ministries

Address: 827 West 14th Court, Bloomington, IN 47404

Phone: 812.339.3429

E-Mail: kbroadfoot@mcum.org

Website: www.mcum.org

President of Board of Directors: Elizabeth Johnson

Name of Executive Director: Katie Broadfoot

Phone: 812.339.3429 ext. 18

E-Mail: kbroadfoot@mcum.org

Name and Title of Person to Present Proposal to the Committee: Katie Broadfoot

Phone: 812.339.3429 ext. 18

E-Mail: kbroadfoot@mcum.org

Name of Grant Writer: Katie Broadfoot

Phone: 812.339.3429 ext. 18

E-Mail: kbroadfoot@mcum.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 26 | 27 | 108 |

AGENCY 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 United Ministries creates lasting solutions to economic, educational and social injustice in our community through quality services, collaboration and innovation.

PROJECT INFORMATION

Project Name: Secure & Sustainable MCUM

Total cost of project: \$56,907

Requested amount of JHSSF funding: \$39,132.18

Total number of City residents anticipated to be served by this project in 2019: 1,488

Total number of clients anticipated to be served by this project in 2019: 1,730

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

We are requesting \$35,351 for an urgent and unexpected need to replace the security system at MCUM's Administration & Self-Sufficiency Center and Compass-North site and \$3,781.18 for energy efficient lighting.

Jack Hopkins funding will help keep MCUM's 53 staff and the 130 children and 1,600 households we serve over the course of one year safe and will also contribute to an energy overhaul that will save the agency 73% on our energy bill due to more efficient lighting.

As part of a larger undertaking, we seek Jack Hopkins funding specifically to:

- Update a 24-year old security system that will be obsolete in 2020;
- Install new fire protection/security to two buildings, and;
- Upgrade 180 lights in our Compass-North building & 98 lights in our Administration building to more efficient lights.

Address where project will be housed: 827 West 14th Court, 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 to capital improvements to real estate and if you do not own the property at which the project 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.

Not applicable.

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.

Not applicable.

Note: Funds will not be disbursed until all requisite variances or approvals are obtained.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

Not applicable.

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

\$2,500 – Let it Shine Lighting LLC (Confirmed)

\$7,280 – Duke Energy (Confirmed)

\$7,994.82 – MCUM donors (pending JH funds)

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

This is a straightforward project that should be easy to implement. We have already secured the necessary estimates and will begin the upgrades as soon as funding is secured.

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

The funding sources mentioned above have been confirmed and will be made available as soon as the projects are scheduled. Once Jack Hopkins support is confirmed, we will adjust the amount to be raised by MCUM donors in order to complete the project, if necessary, and begin a special capital improvements fundraiser. We would complete the agency fundraising within 3 months of notice of confirmation of Jack Hopkins funding to us and the amount awarded.

FISCAL LEVERAGING *(100 words or less)*

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

Monroe County United Ministries

This project is essential to MCUM's ability to provide important services to Monroe County residents. Clients, staff, donors, volunteers, and all who visit MCUM should feel they are in a secure environment where appropriate measures have been taken to insure their safety. A more secure site is likely to help keep Compass-North's enrollment at capacity and retain staff and volunteers. Additionally, the confirmed funding sources listed above, along with Jack Hopkins funds to push the fundraising close to the amount needed for the project will help attract donors to this capital improvement project, whereas a large funding gap may decrease the likelihood that a donor would contribute to this project, as it is not directly funding our programs.

FUNDING PRIORITIES -- RANKED

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

Yes No

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

| | Item | Cost |
|------------------------|--------------------------------------|--------------------|
| Priority #1 | Compass-N fire alarm replacement | \$12,322 |
| Priority #2 | SSC fire alarm replacement | \$19,134 |
| Priority #3 | Security System, SSC & Compass-North | \$3,895 |
| Priority #4 | Lighting, Compass-North | \$13,166 |
| Priority #5 | Lighting, Self-Sufficiency Center | \$8,390 |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$39,132.18 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Monroe County United Ministries (MCUM) provides much-needed services to Monroe County residents.

The Consolidated Plan ranked affordable childcare as a “close second” as “the most critical need for our community” (55). The number of children in Monroe County in the 0-4 age group has increased by 9% in recent years (SCAN 50), while spaces in licensed centers have decreased. Compass Early Learning Center provides 180 spots and offers a sliding-fee scale to parents that caps the of care at 10% of their household income, greatly reducing the financial burden of childcare while also removing a barrier to employment or higher education opportunities. Compass Early Learning Center enables low-income parents to “maintain stable income, retain income, and [potentially] build savings and assets” – stated goals of the Anti-Poverty Strategy (4B-abc).

MCUM’s Self-Sufficiency Center provides both basic needs assistance (food, cleaning/hygiene items, clothing, etc.) as well as long-term goal setting and asset-building that helps empower the household to build financial self-sufficiency. Many of our households receiving assistance are “forced to choose whether money should be spent on food, medical bills, or other essentials” (SCAN 128), with up to 42% reporting having some degree of difficulty meeting their basic needs each month (130).

A sound infrastructure is essential to providing these services. Additionally, every dollar that can be saved with improved energy efficiency will more directly benefit the children and families MCUM serves.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

This project will fund important capital improvements that will replace equipment that is becoming obsolete and lighting that is not efficient.

Our previous security and fire protection system is 24 years old and has never been replaced. We expect the new system to last just as long.

A complete lighting overhaul will allow the agency to enjoy the greatest financial savings and project longevity. In the main office and Self-Sufficiency Center, the 5-year savings from improved lighting is quoted at \$18,868 and in Compass-North it is \$27,401. While lights will eventually need to be replaced, the savings generated by the overhaul will sustainably finance the cost when it is time to replace them.

LONG-TERM BENEFITS (200 words or less)

This project will ensure resources are being effectively the community issues we seek to reduce, per our mission statement.

Having a security system is essential to the well-being of the staff, clients, and resource if not for security system. A motion-sensed alarm activated outside of business hours will signal potential break-ins, and a panic button will automatically alert the police and send them to MCUM if activated. While incidents are few and far between over our 80-year history, we have had staff leave the agency and parents pull their children from our program following safety threats and have dealt with several break-ins and attempted break-ins that threaten the ability of our program, particularly the food pantry, to serve as many clients. Our previous security system is 24 years old and has never been replaced.

The energy efficient lighting ensures MCUM will not incur unnecessary energy loss expenses, sustaining our overall capacity to serve. Let It Shine Lighting LLC estimated that within 16 months of installing the lights, MCUM will save 74% or more on our electricity bill, which amounts to about \$46,269 over five years offset from our operating budget. **That savings represents the equivalent of subsidizing the cost of care for the 22 preschoolers at Compass-North enrolled on MCUM's fee scale for two years or operating MCUM's food pantry in full for four years.**

Explain how your program will have broad and long-lasting benefits for our community.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality

standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

1,462 SSC Clients (1,301 City) with new/improved access to the Self-Sufficiency Center.

219 Compass-North parents who will be relieved by the improved building security.

180 Compass-North children (122 City) who will be better protected due to increased security.

1,462 SSC clients in one year protected from fire.

202 Compass-North children & staff in one year protected from fire.

53 MCUM staff with increased and improved security in their workplace.

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.

Secure & Sustainable MCUM
Project Budget 2019

Revenue

| | | |
|--------------------------------------|-----------|------------------|
| Jack Hopkins Social Services funding | \$ | 39,132.18 |
| MCUM donors | \$ | 7,994.82 |
| Duke Energy | \$ | 7,280.00 |
| Let it Shine Lighting, LLC | \$ | 2,500.00 |
| Total | \$ | 56,907.00 |

Expenses

| | | |
|--------------------------------------|-----------|------------------|
| Compass-N fire alarm replacement | \$ | 12,322.00 |
| SSC fire alarm replacement | \$ | 19,134.00 |
| Security System, SSC & Compass-North | \$ | 3,895.00 |
| Lighting, Compass-North | \$ | 13,166.00 |
| Lighting, Self-Sufficiency Center | \$ | 8,390.00 |
| Total | \$ | 56,907.00 |

MCUM Main Office Proposal

| | |
|------------------------|-------------------------|
| Date: | February 1, 2019 |
| Prepared for: | Katie Broadfoot |
| Prepared by: | Jeff Goldsberry |
| Total Due : | \$8,390.00 |
| Duke Incentive: | \$2,772.00 |
| Let It Shine Donation: | \$1,000.00 |
| Net Cost: | \$4,618.00 |

Premium Quality Lighting
(812) 961-8856
1537 S Rogers Street
Bloomington, IN 47403
jgoldsberry@pqlighting.com



Trust the rebate expert.

| SAVINGS | | | |
|---|----|------------------------------|--------------------------------|
| Retrofit | 6 | 68 watt (2) T8U fixtures to | 25 watt LED fixtures. 335.40 |
| Retrofit | 31 | 136 watt (4) T8 fixtures to | 32 watt LED fixtures. 4,191.20 |
| Retrofit | 4 | 38 watt (1) T9 fixtures to | 15 watt LED fixtures. 119.60 |
| Retrofit | 10 | 96 watt (2) T12 fixtures to | 20 watt LED fixtures. 988.00 |
| Retrofit | 37 | 192 watt (4) T12 fixtures to | 32 watt LED fixtures. 7,696.00 |
| Replace | 4 | 100 A19 lamps with | 16 watt LED lamps. 436.80 |
| Replace | 6 | 115 watt soffit lights with | 27 watt LED fixtures. 686.40 |
| Maintenance savings (utilizing Hubbell Energy calculator) | | | 2,005.05 |
| HVAC savings (utilizing Hubbell Energy calculator) | | | 2,409.23 |
| Combined 5 year savings from lighting upgrade | | | \$18,867.68 |

| Return on Investment | Annual Savings | Monthly Savings |
|----------------------|-------------------|-----------------|
| 15 months | \$3,773.54 | \$314.46 |

79.81% less energy used with new LED system producing better light quality.
LED fixtures, drivers and strips are warranted for 5 years for full replacement.
LED screw in lamps are warranted for 3 years for full replacement.

| | | | |
|--------------------------------|--------------|-----------|-------------------|
| LED 32 watt 5000K retrofit | 78.00 | each X 68 | 5,304.00 |
| LED 25 watt 5000K retrofit | 60.00 | each X 6 | 360.00 |
| LED 20 watt 5000K retrofit | 90.00 | each X 10 | 900.00 |
| LED 15 watt 5000K downlight | 20.00 | each X 4 | 80.00 |
| LED 16 watt A-21 lamp | 10.00 | each X 4 | 40.00 |
| LED 27 watt 5000K canopy light | 75.00 | each X 6 | 450.00 |
| Installation | | | 1,256.00 |
| | | | \$8,390.00 |

Terms: 75% of total due w/ signed order, balance upon completion of installation.
Leasing available w/ no money down and no out of pocket.

Purchaser is responsible for disposal of old fixtures and/or lamps.

Insurance available upon request.

Savings based on 50 hours per week.

Quote good for 30 days.

Duke incentive written by LIS Lighting & payable to customer within 60 days of installation.

Installation Address: 827 W 14th Ct, Bloomington, IN 47404

Phone: 812 339-3429

Customer email address: kbroadfoot@mcum.org

Customer Signature: _____ Date: _____

MCUM Preschool Proposal

| | |
|------------------------|-------------------------|
| Date: | February 1, 2019 |
| Prepared for: | Katie Broadfoot |
| Prepared by: | Jeff Goldsberry |
| Total Due : | \$13,166.00 |
| Duke Incentive: | \$4,508.00 |
| Let It Shine Donation: | \$1,500.00 |
| Net Cost: | \$7,158.00 |

Premium Quality Lighting
(812) 961-8856
1537 S Rogers Street
Bloomington, IN 47403
jgoldsberry@pqlighting.com



Trust the rebate expert.

| SAVINGS | | | | |
|---|----|------------------------------|-----------------------|--------------------|
| Retrofit | 28 | 68 watt (2) T8 fixtures to | 20 watt LED fixtures. | 2,096.64 |
| Retrofit | 18 | 68 watt (2) T8 fixtures to | 32 watt LED fixtures. | 1,010.88 |
| Retrofit | 5 | 102 watt (3) T8 fixtures to | 32 watt LED fixtures. | 546.00 |
| Retrofit | 85 | 136 watt (4) T8 fixtures to | 32 watt LED fixtures. | 13,790.40 |
| Retrofit | 1 | 48 watt (2) T12 fixtures to | 25 watt LED fixtures. | 35.88 |
| Replace | 3 | 60 watt A19 lamps with | 9 watt LED lamps. | 238.68 |
| Replace | 16 | 100 watt A19 lamps with | 16 watt LED lamps. | 2,096.64 |
| Replace | 23 | 32 watt canned fixtures with | 15 watt LED fixtures. | 609.96 |
| Replace | 1 | 115 watt canopy light with a | 27 watt LED fixture. | 137.28 |
| Maintenance savings (utilizing Hubbell Energy calculator) | | | | 3,265.02 |
| HVAC savings (utilizing Hubbell Energy calculator) | | | | 3,574.39 |
| Combined 5 year savings from lighting upgrade | | | | \$27,401.77 |

| Return on Investment | Annual Savings | Monthly Savings |
|----------------------|-------------------|-----------------|
| 16 months | \$5,480.35 | \$456.70 |

73.73% less energy used with new LED system producing better light quality.
LED fixtures, drivers and strips are warranted for 5 years for full replacement.
LED screw in lamps are warranted for 3 years for full replacement.

| | | | |
|--------------------------------|-------|--------------|--------------------|
| LED 32 watt 5000K retrofit | 78.00 | each X 108 | 8,424.00 |
| LED 25 watt 5000K retrofit | 60.00 | each X 1 | 60.00 |
| LED 20 watt 5000K retrofit | 60.00 | each X 28 | 1,680.00 |
| LED 11 watt 5000K A-19 lamp | 8.00 | each X 3 | 24.00 |
| LED 16 watt 5000K A-21 lamp | 10.00 | each X 16 | 160.00 |
| LED 15 watt 5000K can retrofit | 25.00 | each X 23 | 575.00 |
| LED 27 watt 5000K canopy light | 75.00 | each X 1 | 75.00 |
| | | Installation | 2,168.00 |
| | | | \$13,166.00 |

Terms: 75% of total due w/ signed order, balance upon completion of installation.
Leasing available w/ no money down and no out of pocket.

Purchaser is responsible for disposal of old fixtures and/or lamps.

Insurance available upon request.

Savings based on 60 hours per week.

Quote good for 30 days.

Duke incentive written by LIS Lighting & payable to customer within 60 days of installation.

Installation Address: 827 W 14th Ct, Bloomington, IN 47404

Phone: 812 339-3429

Customer email address: kbroadfoot@mcum.org

Customer Signature: _____ Date: _____

DATE: September 18, 2018

TO: Jamie Buck
Monroe County United Ministries

FROM: Keith Maurice
Koorsen Fire & Security
812-376-7586

SUBJECT: Main Bldg Fire Alarm Replacement

The following is our proposal for the above project. Please let me know if you have any questions.

System(s) Provided:

Scope of Work:

KFS to provide and install new Fire Alarm system. Customer to provide any 120VAC circuits. Price is proposed at normal business hourly rate. KFS will run new wiring for devices that will need to be added per today's standards. Customer will need to re sign new monitoring agreement.

- **Scope continued:**
 - Submittal of drawings or correspondence to any State, Insurer or Authority Having Jurisdiction is included.
 - No retainage shall be held.
 - Installation and termination of devices is included.
 - Supply and installation of all cable, raceways, chases, and conduit is included.
 - All 120 VAC power required by our system is to be supplied by others. Power is to be dedicated to our equipment unless specified otherwise.
 - Any trenching, backfilling, sealing, fire stopping, cutting, painting or patching required to complete the scope of work is not included.
 - A scissor or boom lift is not included.
 - Any Fire Watch that this project may require is not included.
 - We will provide the required devices per the attached Bill of Material.
 - We are responsible for the final termination at the control panel(s), system programming, system check out, training and system manual.
 - We will be re-using the existing cable and some devices for this project. If the cable or devices prove to be incompatible with the new system or are damaged, extra charges will be incurred.
 - We will not supply any additional devices required by the Authority Having Jurisdiction. These will be an extra cost.
 - We are not responsible for troubleshooting or repairs of existing problems other than what is described above. Any additional work will be billed accordingly.
 - We will perform our scope of work during normal working hours, Monday through Friday, 8:00 AM to 5:00 PM. Any work required to be performed at other than normal working hours will be invoiced accordingly.
 - This proposal contains no allowances for working in environments containing asbestos of any type, either encapsulated or friable. Should asbestos be present, the contract would have to be amended to include extra charges associated with the biohazard disposal and extra time required to work in this type of environment.

Offering complete Design, Installation, and Service since 1946

Fire Alarm
Security and Fire Monitoring
CCTV- Video Surveillance
Card Access

Sprinkler Systems (Backflow/Hydrants/Fire Pumps)
Restaurant & Industrial Fire Suppression
Clean Agent & Special Hazards Fire Suppression
Complete Installation, Inspection & Maintenance

Exit/Emergency Lighting
Fire Extinguishers
Intercom, Sound, Data, MATV
Nurse Call

- The data contained in this proposal has been submitted in confidence. Customer will not disclose or permit disclosure of any information in this document without the prior written consent of Koorsen Fire & Security or use or permit the use of such information or data to compete with Koorsen Fire & Security in any manner.
- This proposal may be withdrawn by Koorsen Fire & Security if not accepted within 60 days of the above date.
- This proposal assumes full and unfettered access will be given to all necessary areas of the building for Koorsen Fire & Security to perform the scope of work as outlined in this proposal. Any restrictions encountered may cause lost time and inhibit productivity. Excessive lost time may result in additional charges.
- We have designed this system to the best of our ability and our interpretation of applicable codes. However, if the AHJ requires any additional devices, these will be a change order and extra cost.
- The customer is to provide Koorsen Fire & Security CAD drawings of the plans applicable to the scope of work in order for Koorsen Fire & Security to complete our drawings. If the CAD drawings are not available, an extra charge will be incurred.
- Customer to provide the necessary wall space for mounting of control panels and power supplies.
- This proposal does not cover existing device replacement or “trouble-shooting” of existing system. All “trouble-shooting” and service will be performed on a TIME AND MATERIAL basis.
- Koorsen Fire & Security will require 48-hour notice for work performed.
- Systems must be clear of all “Trouble” signals prior to final check out.
- Systems will require monitoring for final check out.
- Record of completion must be awarded / completed prior to final check out.

Bill of Material:

| Qty | Mfr. | Device Description |
|-----|-------------|---|
| 1 | Siemens | 252-point system with 170W power supply and standard operator interface |
| 1 | Siemens | Black 2 Height Unit 1 Window Enclosure kit (for FC922, FC924) |
| 1 | Siemens | Dialer module (DACT) |
| 1 | Siemens | RS485 class A module (iso.) |
| 1 | Siemens | Remote Annunciator (key, bl) |
| 2 | Power Sonic | BATTERY 12V 18AMP |
| 45 | Siemens | Optical Smoke Detector |
| 5 | Siemens | Heat Detector |

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Security and Fire Monitoring
CCTV- Video Surveillance
Card Access

Sprinkler Systems (Backflow/Hydrants/Fire Pumps)
Restaurant & Industrial Fire Suppression
Clean Agent & Special Hazards Fire Suppression
Complete Installation, Inspection & Maintenance

Exit/Emergency Lighting
Fire Extinguishers
Intercom, Sound, Data, MATV
Nurse Call

| | | |
|----|-------------|--|
| 1 | Siemens | 4 Input / 4 Output Monitor Module |
| 50 | Siemens | 6" DETECTOR BASE ASSY |
| 15 | Siemens | MANUAL STATION -DUAL ACTION |
| 4 | Siemens | DUCT HOUSING - 2 WIRE WITH RELAY FOR ADDRESSABLE SYSTEMS |
| 4 | Siemens | Optical Smoke Detector |
| 4 | Siemens | ST-50 5 FT Sampling Tube |
| 1 | Siemens | Complete 9 amp PAD-4 kit (enclosure, board, 300W power supply) |
| 20 | Siemens | Z STROBE MULTI-CANDELA WALL RED |
| 8 | Siemens | Z HORN MULTI CANDELA WALL RED |
| 1 | Honeywell | Communicator |
| 1 | Siemens | AS HORN 75CD RED WEATHERPROOF |
| 1 | Siemens | ST STROBE WEATHERPROOF BACK BOX RED |
| 1 | Siemens | SURFACE MOUNTING WEATHERPROOF BACK BOX KIT |
| 2 | Power Sonic | BATTERY 12V 7AMP |
| 1 | Ditek | 120V 40KA SER IN NEMA4 ENCL |
| 5 | Ditek | 24 VDC/VAC Surge Suppressor-2 circuit w/ base |

Pricing: The total cost for material and labor will be..... \$19,134.00
 This includes a ONE (1) year labor and ONE (1) year parts warranty.

Notes: Koorsen Fire & Security will bill, upon credit approval, progressively on a monthly basis until the project is complete.

Payment Options:

Select your preferred payment option / terms*:

- Terms purchase (purchase amount of \$19,134.00)
- Lease \$19,134.00. 36 month lease, 36 monthly payments of \$657.00.
- Lease \$19,134.00. 48 month lease, 48 monthly payments of \$523.00.
- Lease \$19,134.00. 60 month lease, 60 monthly payments of \$444.00.

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* The lease options are provided as an estimate only, Final lease payment amount is subject to credit verification and approval by our third party leasing company. Any fees and/or applicable taxes may be added. Lease options shown are based on \$0 down and a \$1.00 buyout. Other options available.

Koorsen Fire & Security Profile:

Koorsen Fire & Security, founded in 1946, is a recognized leader in low voltage systems contracting. Our products can be found working everywhere, from high-rise buildings to the corner retail store, throughout the United States. For over 60 years, we have earned the confidence of architects, engineers, owners and contractors. Clients vary widely to include virtually every type of industrial, commercial, and institutional facility.

Koorsen has been installing low voltage electronic and suppression systems throughout the United States since 1946. Since we are a privately held distributor/contractor that is not controlled by a single manufacturer or supplier, it enables us to offer our customers a variety of products, services and suppliers. We constantly review these manufacturers and suppliers in order to provide our customers the best possible equipment to meet their needs.

Our people are our strongest resource; the quality of our products is a close second. Combining the two ensures our clients the maximum return on their product dollar. Koorsen Fire & Security wants to help you complete your integrated systems goals, on time and under budget.

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KOORSEN FIRE & SECURITY TERMS AND CONDITIONS

1. **AGREEMENT.** Prices per this quotation are in effect for 30 days from the date of this quote. This Agreement shall become effective upon the execution by Customer and acceptance and execution of this Agreement by a duly authorized representative of Koorsen Fire & Security. This Agreement constitutes the entire agreement between the parties and supersedes any previous agreement, understanding or order between the parties. Should the terms and conditions of any purchase order of Customer issued in connection with this Agreement conflict with the terms contained in this Agreement or add any new terms to this Agreement, such new terms or different terms shall be of no force or effect. No modification or waiver of the terms of this Agreement shall be binding unless made in writing and signed by both parties. This Agreement is made and entered into in the State of Indiana and shall be in all respects governed by and construed in accordance with the laws of the United States and the State of Indiana as if entirely performed in Indiana and without regard to any conflict of law rules and without regard to any rules of construction or interpretation relating to which party drafted this Agreement. This Agreement may not be assigned by Customer directly or indirectly (including, without limitation, by merger or sale of stock) without the prior written consent of KFS, which consent may be withheld by KFS, in its sole discretion, for any reason or no reason.
2. **SALE OF INSTALLATION AND/OR EQUIPMENT.** KFS shall sell to Customer and the Customer shall purchase from the KFS the installation ("System") and/or equipment ("Equipment") identified on the front of this Agreement. All shipments, unless otherwise specified, are quoted F.O.B. origin and may be subject to additional "hazardous material" charges or other special shipping and handling fees.
3. **PURCHASE PRICE AND PAYMENT.** Customer agrees to pay KFS the purchase price for the Equipment and/or Services set forth on the proposal or as otherwise set forth on the KFS's invoice. All charges shall be paid "NET 25 DAYS" from the date of invoice, unless otherwise specified on the invoice. If KFS retains a collection agency, legal counsel, or incurs any out-of-pocket expenses to collect overdue payments, all such collection costs shall be paid by Customer. Customer acknowledges that, other than KFS's completion of installation of a System, payment to KFS is not contingent on any occurrence, matter or event, including, without limitation, Customer's receipt of payment from any third party such as an owner or insurance company.
4. **ALLOCATION OF RISK OF LOSS.** Any risk of loss associated with the Equipment remains with KFS until the goods arrive at the place of delivery. After the goods arrive at the place of delivery, the risk shall be exclusively that of the Customer. The risk of loss remains with the Customer, even regarding Equipment that is subsequently returned to KFS, until receipt by KFS.
5. **JOBSITE, APPROVAL AND PERMITS.** Unless otherwise specified, Customer shall provide, at Customer's expense, all approvals and permits required by applicable law. Customer will make premises available without interruption during KFS normal working hours, 8:00 A.M. to 4:45 P.M., exclusive of Saturdays, Sundays, and holidays. Customer understands that the installation will necessitate drilling into various parts of the premises. KFS intends, generally, to conceal wiring in the finished areas of the premises, however, there may be areas in which due to construction, decoration, or furnishing of the premises, KFS determines, in its sole discretion, that it would be impractical to conceal the wiring and in such cases, wire will be exposed. Customer agrees to provide 110 AC electrical outlets at designated locations for equipment requiring AC power. Customer agrees to provide for lifting and replacing carpeting, if required, for installation of floor mats or wiring. Customer has the authority to engage KFS to carry out the installation in the premises. The Customer agrees to furnish any necessary electric current through the Customer's meter and at the Customer's own expense. Customer will obtain and keep in effect all permits or licenses that may be required for the installation and operation of the system. Customer has the affirmative duty to inform KFS, prior to beginning of installation, of every location at the premises where KFS' employees or agents should not (because of concealed obstructions or hazards such as pipes, wires or asbestos) enter or drill holes. If asbestos or other health hazardous material is encountered during installation, KFS will cease work until Customer, at its sole expense, obtains clearance from a licensed asbestos removal or hazardous material contractor and that continuation of work will not pose any danger to KFS personnel. In no case shall KFS be liable for discovery or exposure of hidden asbestos or other hazardous material, and Customer shall indemnify and hold KFS and its employees harmless from any claims brought against KFS and/or its employees by third parties for damages, personal injury, death, emotional injury, whether actual or prospective, allegedly caused by the presence, spread, ingestion or inhalation of any substance/vapor on or originating from Customer's premises.
6. **GRANT OF SECURITY INTEREST.** Customer, on behalf of the owner and Customer, grants to KFS a security interest in the System or Equipment to secure payment of the purchase price and grants to KFS an irrevocable power of attorney to execute and file UCC-1 Financing Statements on behalf of Customer for the benefit of KFS, as secured creditor, to protect the security interest. Upon payment in full of the purchase price, and all associated costs and charges required under this Agreement, title to the system shall pass to Customer. KFS shall have all of the rights of a secured creditor under the Uniform Commercial Code including the right to enter Customer's premises and to disable or remove the System and equipment, or both.
7. **LIMITED WARRANTY-** *Unless otherwise stated, any part of the system, including the wiring, installed under this Agreement which proves to be defective material within one (1) year of the date of completion of installation will be repaired or replaced at KFS' option with a new or functionally operative part. Labor required to repair or replace such defective components or to make mechanical adjustments to the system will be free of charge for a period of one (1) year following the completion of the original installation. This warranty is extended only to the original consumer purchaser of the system and may be enforced only by such person. To obtain service under this warranty, call or write our local KFS Service Department at the telephone number or address found in your local yellow pages. This warranty is void if the system is inspected, tested, or serviced by anyone other than Koorsen Fire & Security during the warranty period. **THE ABOVE LIMITED WARRANTY IS IN LIEU OF ALL OTHER EXPRESSED WARRANTIES. THERE ARE NO WARRANTIES WHICH EXTEND BEYOND THE FACE HEREOF, AND KFS DISCLAIMS ANY IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE***
8. **BREACH BY KFS.** Customer expressly agrees that no action at law or in equity shall be maintained by Customer against KFS for KFS's alleged breach of this Agreement or violation of any federal or state law now in effect or hereafter enacted with respect to any obligation or duty incurred under this Agreement by KFS, unless: (i) Customer notifies KFS in writing at the address specified in this Agreement within ten (10) days from date of such alleged breach or violation, and provided KFS does not remedy or correct the breach or violation within sixty (60) days from the receipt of the notice; and (ii) such action at law or in equity is commenced by Customer within one (1) year from the finished date of the installation of the System.
9. **LIMITATION OF LIABILITY.** THE AMOUNTS PAYABLE TO KFS HEREIN UNDER ARE BASED UPON THE VALUE OF THE SERVICES AND THE SCOPE OF LIABILITY AS HEREIN SET FORTH AND ARE UNRELATED TO THE VALUE OF THE CUSTOMER'S PROPERTY OR PROPERTY OF OTHERS LOCATED IN CUSTOMER'S PREMISES. IT IS IMPRACTICAL AND EXTREMELY DIFFICULT TO FIX THE ACTUAL DAMAGES, IF ANY, WHICH MAY PROXIMATELY RESULT FROM FAILURE ON THE PART OF KFS TO PERFORM ANY OF ITS OBLIGATIONS HEREUNDER. THE CUSTOMER DOES NOT DESIRE THIS CONTRACT TO PROVIDE FOR FULL LIABILITY OF KFS AND AGREES THAT KFS SHALL BE EXEMPT FROM LIABILITY FOR LOSS, DAMAGE OR INJURY DUE DIRECTLY OR INDIRECTLY TO OCCURRENCES, OR CONSEQUENCES THEREFROM WHICH THE SERVICE OR SYSTEM IS DESIGNED TO DETECT OR AVERT. IF KFS SHOULD BE FOUND LIABLE FROM LOSS, DAMAGE OR INJURY DUE TO A FAILURE OF SERVICE OR EQUIPMENT IN ANY RESPECT, ITS LIABILITY SHALL BE LIMITED TO A SUM EQUAL TO 10% OF THE

Monroe County United Ministries

ANNUAL SERVICE CHARGE OR \$500.00, WHICHEVER IS GREATER, AS THE AGREED UPON DAMAGES AND NOT AS A PENALTY, AS THE EXCLUSIVE REMEDY, AND THAT THE PROVISIONS OF THIS PARAGRAPH SHALL APPLY IF LOSS, DAMAGE OR INJURY, IRRESPECTIVE OF CAUSE OR ORIGIN, RESULTS DIRECTLY OR INDIRECTLY TO PERSON OR PROPERTY FROM PERFORMANCE OR NONPERFORMANCE OF OBLIGATIONS IMPOSED BY THIS CONTRACT OR FROM NEGLIGENCE, ACTIVE OR OTHERWISE, OF KFS, ITS AGENTS OR EMPLOYEES. FOR REPAIR, TESTING, OR INSTALLATION OF ANY SPRINKLER SYSTEM AND ITS PARTS, IT IS CUSTOMER'S RESPONSIBILITY TO SHOW KFS ALL DRAIN VALVES, INCLUDING THOSE HIDDEN ABOVE THE CEILING OR IN A WALL. KFS WILL NOT BE RESPONSIBLE FOR WATER DAMAGE CAUSED FROM ANY UNDISCLOSED DRAIN VALVE, WHETHER OR NOT IT WAS KNOWN TO CUSTOMER.

- 10. **INDEMNIFICATION.** Customer indemnifies KFS, holds KFS harmless, and agrees to defend KFS from and against any and all lawsuits, proceedings (including, without limitation, civil, criminal, administrative and investigative proceedings, whether threatened, pending or completed), claims demands, losses, damages (including, without limitation, indirect, direct, special and consequential damages and insurance deductibles), actions, liabilities (including without limitation, strict liability and joint and several liability), costs and expenses (including, without limitation, fines, penalties and the reasonable costs of investigation, court costs, costs of arbitration, costs of appeal, and reasonable attorneys' fees) (collectively referred to as "Damages") arising out of or relating to, directly or indirectly: a breach of the Agreement by Customer; or the action or inaction of KFS in the performance of the installation of the System; provided that this provision shall not apply to Damages arising out of or relating to the recklessness or willful misconduct of KFS, when deemed by a court of competent jurisdiction to have materially and directly contributed to the Damages. As used in this paragraph, the term "KFS" shall include KFS's employees, agents, representatives, shareholders, officers, directors and subcontractors, at any level, and the subcontractor's representatives, agents, employees, shareholders, officers and directors. This provision shall survive completion of the work and the termination of the Agreement, for any reason.
- 11. **INSURANCE.** IT IS UNDERSTOOD THAT KFS IS NOT AN INSURER, THAT IT SHALL SPECIFICALLY BE THE OBLIGATION OF CUSTOMER TO PURCHASE ANY INSURANCE WHICH CUSTOMER DESIRES TO PROTECT ITSELF FROM LOSS, DAMAGE OR INJURY DUE DIRECTLY OR INDIRECTLY TO OCCURRENCES OR CONSEQUENCES THEREFROM, WHICH THE SERVICE OR SYSTEM IS DESIGNED TO DETECT OR AVERT.
- 12. **SUBROGATION.** Each party waives rights of subrogation against the other party to the extent of their respective first party insurance coverages, for any and all losses suffered by either party, whether or not caused by the negligence of the Customer or KFS or those for whom they are responsible; provided that this release shall be in force and effect only with respect to loss or damage occurring during the time each parties' insurance policies contain a clause to the effect that this release shall not affect said policies or the right of the insured to recover.
- 13. **CONSENT TO VENUE.** Customer consents to the exclusive jurisdiction and venue of Courts of the State of Indiana and Marion County with

respect to the enforcement of this Agreement, the collection of any amounts due under this Agreement or any disputes arising under this Agreement. Customer agrees that effective service of process may be made upon Customer by U.S. Mail at the address on the front of this Agreement.

- 14. **USE OF DESIGNS AND DATA.** Any knowledge or information, including drawings and data, which KFS shall have disclosed or may hereafter disclose to Customer, incident to installation of the System, shall be deemed to be KFS's confidential and proprietary information and Customer shall take any and all steps as are reasonable to protect the confidentiality of such information and shall not disclose to any other person, or use, such information. KFS does not grant to Customer any reproduction rights or any rights to use such information.
- 15. **SERVICES NOT INCLUDED.**
 - A. When a labor price is submitted, it is based on all work being performed during a five (5) day forty (40) hour work week. If overtime or premium time is performed, an additional charge will be made to the Customer. Normal work weeks are 8 a.m. to 4:45 p.m., Monday through Friday, except holidays.
 - B. Unless otherwise specifically provided in the Proposal, Customer agrees to do all necessary patching of masonry work, painting, carpentry work and the like.
 - C. If applicable, Customer shall also provide a wiring, conduit and labor to connect the provided pressure switches to an equipment to be turned on or off such as alarms, motors, conveyors, fans or cooking equipment.
 - D. If applicable, Customer shall also provide necessary hardware and linkage to permit automatic closing of doors, windows, duct dampers, etc, upon actuation of any provided pressure release trip device. Unless specifically indicated in the Proposal, services do not include costs for any discharge or concentration tests required by approval authorities.
 - E. No provision to exhaust any discharged agent is included in this Proposal.
 - F. Should an employee of KFS be required to attend a "right to know" session at Customer's location, a surcharge will be added to the final invoice.
 - G. THIS PROPOSAL/ESTIMATE IS BASED ON NON-UNION WAGES. IF KFS IS REQUIRED TO PAY DIFFERENT WAGES, SUCH AS PREVAILING WAGES UNDER THE GUIDELINES OF THE US DEPT. OF LABOR, FOR ANY PORTION OF THIS WORK, KFS RESERVES THE RIGHT TO REPRICE ACCORDINGLY.
- 16. **MECHANICS' LIEN NOTICE.** Where KFS is a subcontractor, the Customer acknowledges, agrees and personally accepts service of this Agreement on behalf of the owner of the real property at which the System is to be installed and understands KFS's intention to file a Mechanic's Lien if and when KFS is not paid. The subcontractor is KFS, and the contractor is the Customer, and the amount claimed will be the balance due under this Agreement and any amendments or change orders as of the date of filing a Mechanic's Lien claim. Customer agrees to promptly notify the owner of the premises on which work is to be performed of this Mechanics' Lien Notice.

| Acceptance | For Customer | For Koorsen Fire & Security |
|--------------------------|---------------------|--|
| Date: | | 9/18/18 |
| Printed Name: | | Keith Maurice |
| Signature: | | |
| PO Number: | | |
| Company Name: | | Koorsen Fire & Security |
| Address: | | 7440 International Dr |
| City, State, ZIP: | | Columbus IN 47201 |

DATE: September 18, 2018
TO: Jamie Buck
Monroe County United Ministries
FROM: Keith Maurice
Koorsen Fire & Security
812-376-7586
SUBJECT: Bldg 2 Fire Alarm Replacement

The following is our proposal for the above project. Please let me know if you have any questions.

System(s) Provided:

Scope of Work:

KFS to provide and install new Fire Alarm system. Customer to provide any 120VAC circuits. Price is proposed at normal business hourly rate. KFS will run new wiring for devices that will need to be added per today's standards. Customer will need to re sign new monitoring agreement.

- **Scope continued:**
 - Submittal of drawings or correspondence to any State, Insurer or Authority Having Jurisdiction is included.
 - No retainage shall be held.
 - Installation and termination of devices is included.
 - Supply and installation of all cable, raceways, chases, and conduit is included.
 - All 120 VAC power required by our system is to be supplied by others. Power is to be dedicated to our equipment unless specified otherwise.
 - Any trenching, backfilling, sealing, fire stopping, cutting, painting or patching required to complete the scope of work is not included.
 - A scissor or boom lift is not included.
 - Any Fire Watch that this project may require is not included.
 - We will provide the required devices per the attached Bill of Material.
 - We will return-the system back to service at the end of each work day.
 - We will be re-using the existing cable and some devices for this project. If the cable or devices prove to be incompatible with the new system or are damaged, extra charges will be incurred.
 - We are not responsible for troubleshooting or repairs of existing problems other than what is described above. Any additional work will be billed accordingly.
 - We will perform our scope of work during normal working hours, Monday through Friday, 8:00 AM to 5:00 PM. Any work required to be performed at other than normal working hours will be invoiced accordingly.
 - This proposal contains no allowances for working in environments containing asbestos of any type, either encapsulated or friable. Should asbestos be present, the contract would have to be amended to include extra charges associated with the biohazard disposal and extra time required to work in this type of environment.
 - The data contained in this proposal has been submitted in confidence. Customer will not disclose or permit disclosure of any information in this document without the prior written consent of Koorsen Fire & Security or use or permit the use of such information or data to compete with Koorsen Fire &

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Security in any manner.

- This proposal may be withdrawn by Koorsen Fire & Security if not accepted within 60 days of the above date.
- This proposal assumes full and unfettered access will be given to all necessary areas of the building for Koorsen Fire & Security to perform the scope of work as outlined in this proposal. Any restrictions encountered may cause lost time and inhibit productivity. Excessive lost time may result in additional charges.
- We have designed this system to the best of our ability and our interpretation of applicable codes. However, if the AHJ requires any additional devices, these will be a change order and extra cost.
- The customer is to provide Koorsen Fire & Security CAD drawings of the plans applicable to the scope of work in order for Koorsen Fire & Security to complete our drawings. If the CAD drawings are not available, an extra charge will be incurred.
- Customer to provide the necessary wall space for mounting of control panels and power supplies.

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- Koorsen Fire & Security will require 48-hour notice for work performed.

- Systems must be clear of all “Trouble” signals prior to final check out.
- Systems will require monitoring for final check out.
- Record of completion must be awarded / completed prior to final check out.

Bill of Material:

| Qty | Mfr. | Device Description |
|-----|---------|--|
| 1 | Siemens | 50 Pt Electronic Kit - Main Board - 170W PS |
| 1 | Siemens | 50 pt system Black Enclosure |
| 1 | Siemens | 50 pt system Black rmt annun |
| 20 | Siemens | Optical Smoke Detector |
| 2 | Siemens | Heat Detector |
| 1 | Siemens | 4 Input / 4 Output Monitor Module |
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- 2 Power Sonic BATTERY 12V 12AMP
- 1 Ditek 120V 40KA SER IN NEMA4 ENCL
- 3 Ditek 24 VDC/VAC Surge Suppressor-2 circuit w/ base

Pricing: The total cost for material and labor will be..... \$12,322.00
 This includes a ONE (1) year labor and ONE (1) year parts warranty.

Notes: Koorsen Fire & Security will bill, upon credit approval, progressively on a monthly basis until the project is complete.

Payment Options:

Select your preferred payment option / terms*:

- Terms purchase (purchase amount of \$12,322.00)
- Lease \$12,322.00. 36 month lease, 36 monthly payments of \$423.00.
- Lease \$12,322.00. 48 month lease, 48 monthly payments of \$337.00.
- Lease \$12,322.00. 60 month lease, 60 monthly payments of \$286.00.

* The lease options are provided as an estimate only, Final lease payment amount is subject to credit verification and approval by our third party leasing company. Any fees and/or applicable taxes may be added. Lease options shown are based on \$0 down and a \$1.00 buyout. Other options available.

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Koorsen has been installing low voltage electronic and suppression systems throughout the United States since 1946. Since we are a privately held distributor/contractor that is not controlled by a single manufacturer or supplier, it enables us to offer our customers a variety of products, services and suppliers. We constantly review these manufacturers and suppliers in order to provide our customers the best possible equipment to meet their needs.

Our people are our strongest resource; the quality of our products is a close second. Combining the two ensures our clients the maximum return on their product dollar. Koorsen Fire & Security wants to help you complete your integrated systems goals, on time and under budget.

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3. **PURCHASE PRICE AND PAYMENT.** Customer agrees to pay KFS the purchase price for the Equipment and/or Services set forth on the proposal or as otherwise set forth on the KFS's invoice. All charges shall be paid "NET 25 DAYS" from the date of invoice, unless otherwise specified on the invoice. If KFS retains a collection agency, legal counsel, or incurs any out-of-pocket expenses to collect overdue payments, all such collection costs shall be paid by Customer. Customer acknowledges that, other than KFS's completion of installation of a System, payment to KFS is not contingent on any occurrence, matter or event, including, without limitation, Customer's receipt of payment from any third party such as an owner or insurance company.
4. **ALLOCATION OF RISK OF LOSS.** Any risk of loss associated with the Equipment remains with KFS until the goods arrive at the place of delivery. After the goods arrive at the place of delivery, the risk shall be exclusively that of the Customer. The risk of loss remains with the Customer, even regarding Equipment that is subsequently returned to KFS, until receipt by KFS.
5. **JOBSITE, APPROVAL AND PERMITS.** Unless otherwise specified, Customer shall provide, at Customer's expense, all approvals and permits required by applicable law. Customer will make premises available without interruption during KFS normal working hours, 8:00 A.M. to 4:45 P.M., exclusive of Saturdays, Sundays, and holidays. Customer understands that the installation will necessitate drilling into various parts of the premises. KFS intends, generally, to conceal wiring in the finished areas of the premises, however, there may be areas in which due to construction, decoration, or furnishing of the premises, KFS determines, in its sole discretion, that it would be impractical to conceal the wiring and in such cases, wire will be exposed. Customer agrees to provide 110 AC electrical outlets at designated locations for equipment requiring AC power. Customer agrees to provide for lifting and replacing carpeting, if required, for installation of floor mats or wiring. Customer has the authority to engage KFS to carry out the installation in the premises. The Customer agrees to furnish any necessary electric current through the Customer's meter and at the Customer's own expense. Customer will obtain and keep in effect all permits or licenses that may be required for the installation and operation of the system. Customer has the affirmative duty to inform KFS, prior to beginning of installation, of every location at the premises where KFS' employees or agents should not (because of concealed obstructions or hazards such as pipes, wires or asbestos) enter or drill holes. If asbestos or other health hazardous material is encountered during installation, KFS will cease work until Customer, at its sole expense, obtains clearance from a licensed asbestos removal or hazardous material contractor and that continuation of work will not pose any danger to KFS personnel. In no case shall KFS be liable for discovery or exposure of hidden asbestos or other hazardous material, and Customer shall indemnify and hold KFS and its employees harmless from any claims brought against KFS and/or its employees by third parties for damages, personal injury, death, emotional injury, whether actual or prospective, allegedly caused by the presence, spread, ingestion or inhalation of any substance/vapor on or originating from Customer's premises.
6. **GRANT OF SECURITY INTEREST.** Customer, on behalf of the owner and Customer, grants to KFS a security interest in the System or Equipment to secure payment of the purchase price and grants to KFS an irrevocable power of attorney to execute and file UCC-1 Financing Statements on behalf of Customer for the benefit of KFS, as secured creditor, to protect the security interest. Upon payment in full of the purchase price, and all associated costs and charges required under this Agreement, title to the system shall pass to Customer. KFS shall have all of the rights of a secured creditor under the Uniform Commercial Code including the right to enter Customer's premises and to disable or remove the System and equipment, or both.
7. **LIMITED WARRANTY-** *Unless otherwise stated, any part of the system, including the wiring, installed under this Agreement which proves to be defective material within one (1) year of the date of completion of installation will be repaired or replaced at KFS' option with a new or functionally operative part. Labor required to repair or replace such defective components or to make mechanical adjustments to the system will be free of charge for a period of one (1) year following the completion of the original installation. This warranty is extended only to the original consumer purchaser of the system and may be enforced only by such person. To obtain service under this warranty, call or write our local KFS Service Department at the telephone number or address found in your local yellow pages. This warranty is void if the system is inspected, tested, or serviced by anyone other than Koorsen Fire & Security during the warranty period. **THE ABOVE LIMITED WARRANTY IS IN LIEU OF ALL OTHER EXPRESSED WARRANTIES. THERE ARE NO WARRANTIES WHICH EXTEND BEYOND THE FACE HEREOF, AND KFS DISCLAIMS ANY IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE***
8. **BREACH BY KFS.** Customer expressly agrees that no action at law or in equity shall be maintained by Customer against KFS for KFS's alleged breach of this Agreement or violation of any federal or state law now in effect or hereafter enacted with respect to any obligation or duty incurred under this Agreement by KFS, unless: (i) Customer notifies KFS in writing at the address specified in this Agreement within ten (10) days from date of such alleged breach or violation, and provided KFS does not remedy or correct the breach or violation within sixty (60) days from the receipt of the notice; and (ii) such action at law or in equity is commenced by Customer within one (1) year from the finished date of the installation of the System.
9. **LIMITATION OF LIABILITY.** THE AMOUNTS PAYABLE TO KFS HEREIN UNDER ARE BASED UPON THE VALUE OF THE SERVICES AND THE SCOPE OF LIABILITY AS HEREIN SET FORTH AND ARE UNRELATED TO THE VALUE OF THE CUSTOMER'S PROPERTY OR PROPERTY OF OTHERS LOCATED IN CUSTOMER'S PREMISES. IT IS IMPRACTICAL AND EXTREMELY DIFFICULT TO FIX THE ACTUAL DAMAGES, IF ANY, WHICH MAY PROXIMATELY RESULT FROM FAILURE ON THE PART OF KFS TO PERFORM ANY OF ITS OBLIGATIONS HEREUNDER. THE CUSTOMER DOES NOT DESIRE THIS CONTRACT TO PROVIDE FOR FULL LIABILITY OF KFS AND AGREES THAT KFS SHALL BE EXEMPT FROM LIABILITY FOR LOSS, DAMAGE OR INJURY DUE DIRECTLY OR INDIRECTLY TO OCCURRENCES, OR CONSEQUENCES THEREFROM WHICH THE SERVICE OR SYSTEM IS DESIGNED TO DETECT OR AVERT. IF KFS SHOULD BE FOUND LIABLE FROM LOSS, DAMAGE OR INJURY DUE TO A FAILURE OF SERVICE OR EQUIPMENT IN ANY RESPECT, ITS LIABILITY SHALL BE LIMITED TO A SUM EQUAL TO 10% OF THE

Monroe County United Ministries

ANNUAL SERVICE CHARGE OR \$500.00, WHICHEVER IS GREATER, AS THE AGREED UPON DAMAGES AND NOT AS A PENALTY, AS THE EXCLUSIVE REMEDY, AND THAT THE PROVISIONS OF THIS PARAGRAPH SHALL APPLY IF LOSS, DAMAGE OR INJURY, IRRESPECTIVE OF CAUSE OR ORIGIN, RESULTS DIRECTLY OR INDIRECTLY TO PERSON OR PROPERTY FROM PERFORMANCE OR NONPERFORMANCE OF OBLIGATIONS IMPOSED BY THIS CONTRACT OR FROM NEGLIGENCE, ACTIVE OR OTHERWISE, OF KFS, ITS AGENTS OR EMPLOYEES. FOR REPAIR, TESTING, OR INSTALLATION OF ANY SPRINKLER SYSTEM AND ITS PARTS, IT IS CUSTOMER'S RESPONSIBILITY TO SHOW KFS ALL DRAIN VALVES, INCLUDING THOSE HIDDEN ABOVE THE CEILING OR IN A WALL. KFS WILL NOT BE RESPONSIBLE FOR WATER DAMAGE CAUSED FROM ANY UNDISCLOSED DRAIN VALVE, WHETHER OR NOT IT WAS KNOWN TO CUSTOMER.

- 10. INDEMNIFICATION. Customer indemnifies KFS, holds KFS harmless, and agrees to defend KFS from and against any and all lawsuits, proceedings (including, without limitation, civil, criminal, administrative and investigative proceedings, whether threatened, pending or completed), claims demands, losses, damages (including, without limitation, indirect, direct, special and consequential damages and insurance deductibles), actions, liabilities (including without limitation, strict liability and joint and several liability), costs and expenses (including, without limitation, fines, penalties and the reasonable costs of investigation, court costs, costs of arbitration, costs of appeal, and reasonable attorneys' fees) (collectively referred to as "Damages") arising out of or relating to, directly or indirectly: a breach of the Agreement by Customer; or the action or inaction of KFS in the performance of the installation of the System; provided that this provision shall not apply to Damages arising out of or relating to the recklessness or willful misconduct of KFS, when deemed by a court of competent jurisdiction to have materially and directly contributed to the Damages. As used in this paragraph, the term "KFS" shall include KFS's employees, agents, representatives, shareholders, officers, directors and subcontractors, at any level, and the subcontractor's representatives, agents, employees, shareholders, officers and directors. This provision shall survive completion of the work and the termination of the Agreement, for any reason.
- 11. INSURANCE. IT IS UNDERSTOOD THAT KFS IS NOT AN INSURER, THAT IT SHALL SPECIFICALLY BE THE OBLIGATION OF CUSTOMER TO PURCHASE ANY INSURANCE WHICH CUSTOMER DESIRES TO PROTECT ITSELF FROM LOSS, DAMAGE OR INJURY DUE DIRECTLY OR INDIRECTLY TO OCCURRENCES OR CONSEQUENCES THEREFROM, WHICH THE SERVICE OR SYSTEM IS DESIGNED TO DETECT OR AVERT.
- 12. SUBROGATION. Each party waives rights of subrogation against the other party to the extent of their respective first party insurance coverages, for any and all losses suffered by either party, whether or not caused by the negligence of the Customer or KFS or those for whom they are responsible; provided that this release shall be in force and effect only with respect to loss or damage occurring during the time each parties' insurance policies contain a clause to the effect that this release shall not affect said policies or the right of the insured to recover.
- 13. CONSENT TO VENUE. Customer consents to the exclusive jurisdiction and venue of Courts of the State of Indiana and Marion County with

respect to the enforcement of this Agreement, the collection of any amounts due under this Agreement or any disputes arising under this Agreement. Customer agrees that effective service of process may be made upon Customer by U.S. Mail at the address on the front of this Agreement.

- 14. USE OF DESIGNS AND DATA. Any knowledge or information, including drawings and data, which KFS shall have disclosed or may hereafter disclose to Customer, incident to installation of the System, shall be deemed to be KFS's confidential and proprietary information and Customer shall take any and all steps as are reasonable to protect the confidentiality of such information and shall not disclose to any other person, or use, such information. KFS does not grant to Customer any reproduction rights or any rights to use such information.
- 15. SERVICES NOT INCLUDED.
 - A. When a labor price is submitted, it is based on all work being performed during a five (5) day forty (40) hour work week. If overtime or premium time is performed, an additional charge will be made to the Customer. Normal work weeks are 8 a.m. to 4:45 p.m., Monday through Friday, except holidays.
 - B. Unless otherwise specifically provided in the Proposal, Customer agrees to do all necessary patching of masonry work, painting, carpentry work and the like.
 - C. If applicable, Customer shall also provide a wiring, conduit and labor to connect the provided pressure switches to an equipment to be turned on or off such as alarms, motors, conveyors, fans or cooking equipment.
 - D. If applicable, Customer shall also provide necessary hardware and linkage to permit automatic closing of doors, windows, duct dampers, etc, upon actuation of any provided pressure release trip device. Unless specifically indicated in the Proposal, services do not include costs for any discharge or concentration tests required by approval authorities.
 - E. No provision to exhaust any discharged agent is included in this Proposal.
 - F. Should an employee of KFS be required to attend a "right to know" session at Customer's location, a surcharge will be added to the final invoice.
 - G. THIS PROPOSAL/ESTIMATE IS BASED ON NON-UNION WAGES. IF KFS IS REQUIRED TO PAY DIFFERENT WAGES, SUCH AS PREVAILING WAGES UNDER THE GUIDELINES OF THE US DEPT. OF LABOR, FOR ANY PORTION OF THIS WORK, KFS RESERVES THE RIGHT TO REPRICE ACCORDINGLY.
- 16. MECHANICS' LIEN NOTICE. Where KFS is a subcontractor, the Customer acknowledges, agrees and personally accepts service of this Agreement on behalf of the owner of the real property at which the System is to be installed and understands KFS's intention to file a Mechanic's Lien if and when KFS is not paid. The subcontractor is KFS, and the contractor is the Customer, and the amount claimed will be the balance due under this Agreement and any amendments or change orders as of the date of filing a Mechanic's Lien claim. Customer agrees to promptly notify the owner of the premises on which work is to be performed of this Mechanics' Lien Notice.

| Acceptance | For Customer | For Koorsen Fire & Security |
|--------------------------|---------------------|--|
| Date: | | 9/18/18 |
| Printed Name: | | Keith Maurice |
| Signature: | | |
| PO Number: | | |
| Company Name: | | Koorsen Fire & Security |
| Address: | | 7440 International Dr |
| City, State, ZIP: | | Columbus IN 47201 |

Shannon Brown

Shannon.brown@koorsen.com

P: 812 376 7586

M: 812 350 2597

Monroe County United Ministry

827 W 14th Court
Bloomington, IN 47404

Thank you for the opportunity to introduce Koorsen Fire & Security. With our company breadth and knowledge we are able to provide total protection from one source, helping you to service all your fire, security, and communication needs through one vendor saving you both time and money. In addition, we are able to provide you with 24/7 unparalleled local support and service allowing you peace-of-mind.

We take pride in our customer service when so many of our competitors are all about maximizing profits at the expense of the customer, allowing you to become vulnerable to code violations, property damage or worse. We are the experts in the life safety industry with over 70 years of experience, NICET level trained technicians and engineers, expert knowledge on both federal and local codes and boast one of the industry's largest training centers in the country. We take our jobs seriously and are committed to our customers.

Attached is a proposal for your review, I would enjoy the opportunity to further explain our capabilities and answer any questions you may have concerning any details provided hereafter.

I look forward to working with you and your team. Please feel free to contact me with any questions.

Sincerely,
Shannon Brown
Security Sales Consultant

Site Address:

Number AAAQ13344

Date Sep 19, 2018

Monroe County United Ministry

827 W 14th Court
 Bloomington, IN 47404

Phone 812 339 3429

Scope of Work

KOORSEN FIRE & SECURITY TO REPLACE EXISTING SECURITY SYSTEM WITH NEW DMP WIRELESS SYSTEM CAPABLE OF HOLDING ACCESS CONTROL. CUSTOMER WILL HAVE VIRTUAL KEYPAD TO ASSIGN OR REMOVE PINS, ARM AND DISARM SYSTEM AND VIEW EMPLOYEES ENTERING FROM MOBILE DEVICES AND/OR LAPTOPS.

ADMIN BUILDING WILL RECEIVE 9 DOOR CONTACTS AND 2 MOTION SENSORS, KEY PAD AND SIREN.

SCHOOL BUILDING TO BE ZONED SEPERATELY WITH 18 DOOR CONTACT, 2 MOTION, SIREN & KEYPAD.

PLEASE NOTE AT BOTTOM OF QUOTE, IN THE EVENT CUSTOMER DOES NOT CHOSE ACCESS, PANEL & PANEL PARTS WILL NEED ADDED TO THIS QUOTE \$655.10

Proposed Equipment / Services

| Qty | Description |
|-----------------------|--|
| ADMIN BUILDING | |
| 1 | LTE CELLULAR COMMUNICATOR FOR XR SERIES W/381-2 |
| 1 | GREEN LCD, ARM/DISARM, PROX,WHITE,FOR ALL PANELS |
| 1 | INDOOR SIREN |
| 1 | 18/4 STR JKT CL2P 1M RLBX NAT |
| 2 | WIRELESS COMMERCIAL 50' WALL MOUNT CURTAIN PIR |
| 1 | WIRELESS REPEATER W/PWR SPPLY |
| 9 | UNIVERSAL WIRELESS TRANSMITTER |

SCHOOL BUILDING

GREEN LCD, ARM/DISARM, PROX,WHITE,FOR ALL PANELS
 INDOOR SIREN
 (2) WIRELESS COMMERCIAL 50' WALL MOUNT CURTAIN PIR
 WIRELESS REPEATER W/PWR SPPLY
 (18) UNIVERSAL WIRELESS TRANSMITTER

The data contained in this proposal has been submitted in confidence. Customer will not disclose or permit disclosure of any information in this document without the prior written consent of Koorsen Fire & Security or use or permit the use of such information or data to compete with Koorsen Fire & Security in any manner.

| Qty | Description |
|-------------------------|-------------|
| 1 | Labor |
| Running SubTotal | |

PARTS NEEDED IN EVENT CUSTOMER DOESNT CHOSE ACCESS

| | | |
|-----------------|--|----------|
| 1 | CLIP-ON TAMPER SWITCH | |
| 1 | 12V 7AH SLA BATTERY F1 | |
| 2 | BUS SPLITTER/REPEATER | |
| 2 | REPLACEMENT HARNESS FOR KEYPADS (4 WIRE) | |
| 1 | 142 ZONES,DIALER/NET,350-G ENCL INC 50VA TRNSFRMER | |
| SubTotal | | |
| | | \$655.10 |

Ask me about our service agreement and Monitoring options.

Total

\$3,895.92

Payment Options

Select your preferred payment option / purchase terms*:

- Terms Purchase (purchase amount \$3,895.92)
- Lease \$3,895.92. 24 month lease, \$1 Buyout purchase option, 24 monthly payments of \$210.38
- Lease \$3,895.92. 24 month lease, \$1 Buyout purchase option, 24 monthly payments of \$204.15
- Lease \$3,895.92. 36 month lease, \$1 Buyout purchase option, 36 monthly payments of \$148.82
- Lease \$3,895.92. 36 month lease, \$1 Buyout purchase option, 36 monthly payments of \$144.54
- Lease \$3,895.92. 48 month lease, \$1 Buyout purchase option, 48 monthly payments of \$119.99
- Lease \$3,895.92. 48 month lease, \$1 Buyout purchase option, 48 monthly payments of \$116.49
- Lease \$3,895.92. 60 month lease, \$1 Buyout purchase option, 60 monthly payments of \$105.58
- Lease \$3,895.92. 60 month lease, \$1 Buyout purchase option, 60 monthly payments of \$102.46

* If this quote contains lease payment options, the lease options are provided as an estimate only. Final lease payment amount is subject to credit verification and applicable taxes as required by law.

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KOORSEN FIRE & SECURITY TERMS AND CONDITIONS

AGREEMENT. Prices per this quotation are in effect for 30 days from the date of this quote. This Agreement shall become effective upon the execution by Customer and acceptance and execution of this Agreement by a duly authorized representative of Koorssen Fire & Security. This Agreement constitutes the entire agreement between the parties and supersedes any previous agreement, understanding or order between the parties. Should the terms and conditions of any purchase order of Customer issued in connection with this Agreement conflict with the terms contained in this Agreement or add any new terms to this Agreement, such new terms or different terms shall be of no force or effect. No modification or waiver of the terms of this Agreement shall be binding unless made in writing and signed by both parties. This Agreement is made and entered into in the State of Indiana and shall be in all respects governed by and construed in accordance with the laws of the United States and the State of Indiana as if entirely performed in Indiana and without regard to any conflict of law rules and without regard to any rules of construction or interpretation relating to which party drafted this Agreement. This Agreement may not be assigned by Customer directly or indirectly (including, without limitation, by merger or sale of stock) without the prior written consent of KFS, which consent may be withheld by KFS, in its sole discretion, for any reason or no reason.

SALE OF INSTALLATION AND/OR EQUIPMENT. KFS shall sell to Customer and the Customer shall purchase from the KFS the installation ("System") and/or equipment ("Equipment") identified on the front of this Agreement. All shipments, unless otherwise specified, are quoted F.O.B. origin and may be subject to additional "hazardous material" charges or other special shipping and handling fees.

PURCHASE PRICE AND PAYMENT. Customer agrees to pay KFS the purchase price for the Equipment and/or Services set forth on the proposal or as otherwise set forth on the KFS's invoice. All charges shall be paid "NET 25 DAYS" from the date of invoice, unless otherwise specified on the invoice. If KFS retains a collection agency, legal counsel, or incurs any out-of-pocket expenses to collect overdue payments, all such collection costs shall be paid by Customer. Customer acknowledges that, other than KFS's completion of installation of a System, payment to KFS is not contingent on any occurrence, matter or event, including, without limitation, Customer's receipt of payment from any third party such as an owner or insurance company.

ALLOCATION OF RISK OF LOSS. Any risk of loss associated with the Equipment remains with KFS until the goods arrive at the place of delivery. After the goods arrive at the place of delivery, the risk shall be exclusively that of the Customer. The risk of loss remains with the Customer, even regarding Equipment that is subsequently returned to KFS, until receipt by KFS.

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sole expense, obtains clearance from a licensed asbestos removal or hazardous material contractor and that continuation of work will not pose any danger to KFS personnel. In no case shall KFS be liable for discovery or exposure of hidden asbestos or other hazardous material, and Customer shall indemnify and hold KFS and its employees harmless from any claims brought against KFS and/or its employees by third parties for damages, personal injury, death, emotional injury, whether actual or prospective, allegedly caused by the presence, spread, ingestion or inhalation of any substance/vapor on or originating from Customer's premises.

GRANT OF SECURITY INTEREST. Customer, on behalf of the owner and Customer, grants to KFS a security interest in the System or Equipment to secure payment of the purchase price and grants to KFS an irrevocable power of attorney to execute and file UCC-1 Financing Statements on behalf of Customer for the benefit of KFS, as secured creditor, to protect the security interest. Upon payment in full of the purchase price, and all associated costs and charges required under this Agreement, title to the system shall pass to Customer. KFS shall have all of the rights of a secured creditor under the Uniform Commercial Code including the right to enter Customer's premises and to disable or remove the System and equipment, or both.

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PROVISIONS OF THIS PARAGRAPH SHALL APPLY IF LOSS, DAMAGE OR INJURY, IRRESPECTIVE OF CAUSE OR ORGIN, RESULTS DIRECTLY OR INDIRECTLY TO PERSON OR PROPERTY FROM PERFORMANCE OR NONPERFORMANCE OF OBLIGATIONS IMPOSED BY THIS CONTRACT OR FROM NEGLIGENCE, ACTIVE OR OTHERWISE, OF KFS, ITS AGENTS OR EMPLOYEES. FOR REPAIR, TESTING, OR INSTALLATION OF ANY SPRINKLER SYSTEM AND ITS PARTS, IT IS CUSTOMER'S RESPONSIBILITY TO SHOW KFS ALL DRAIN VALVES, INCLUDING THOSE HIDDEN ABOVE THE CEILING OR IN A WALL. KFS WILL NOT BE RESPONSIBLE FOR WATER DAMAGE CAUSED FROM ANY UNDISCLOSED DRAIN VALVE, WHETHER OR NOT IT WAS KNOWN TO CUSTOMER.

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INSURANCE. IT IS UNDERSTOOD THAT KFS IS NOT AN INSURER, THAT IT SHALL SPECIFICALLY BE THE OBLIGATION OF CUSTOMER TO PURCHASE ANY INSURANCE WHICH CUSTOMER DESIRES TO PROTECT ITSELF FROM LOSS, DAMAGE OR INJURY DUE DIRECTLY OR INDIRECTLY TO OCCURRENCES OR CONSEQUENCES THEREFROM, WHICH THE SERVICE OR SYSTEM IS DESIGNED TO DETECT OR AVERT.

SUBROGATION. Each party waives rights of subrogation against the other party to the extent of their respective first party insurance coverages, for any and all losses suffered by either party, whether or not caused by the negligence of the Customer or KFS or those for whom they are responsible; provided that this release shall be in force and effect only with respect to loss or damage occurring during the time each parties' insurance policies contain a clause to the effect that this release shall not affect said policies or the right of the insured to recover.

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USE OF DESIGNS AND DATA. Any knowledge or information, including drawings and data, which KFS shall have disclosed or may hereafter disclose to Customer, incident to installation of the System, shall be deemed to be KFS's confidential and proprietary information and Customer shall take any and all steps as are reasonable to protect the confidentiality of such information and shall not disclose to any other person, or use, such information. KFS does not grant to Customer any reproduction rights or any rights to use such information.

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If applicable, Customer shall also provide necessary hardware and linkage to permit automatic closing of doors, windows, duct dampers, etc, upon actuation of any provided pressure release trip device. Unless specifically indicated in the Proposal, services do not include costs for any discharge or concentration tests required by approval authorities.

No provision to exhaust any discharged agent is included in this Proposal. Should an employee of KFS be required to attend a "right to know" session at Customer's location, a surcharge will be added to the final invoice.

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Koorsen Fire & Security

Title

Date

Purchase Order #

Customer Acceptance

Title

Date

Customer Name Printed

EXECUTIVE SUMMARY

Koorsen Fire & Security was founded in Indianapolis, Indiana in 1946 and is a fourth-generation, family-owned business. Over the years, Koorsen has become one of the largest and most respected fire protection and security companies in the United States with annual sales exceeding \$130 million.

With over 25 locations and nearly 1000 associates, Koorsen is able to design, install, engineer, program, service and repair virtually all fire and security products, making it one of the only companies in the United States that can truly offer commercial and residential customers total protection from one source.



OUR FAMILY OF SERVICES

- Fire Extinguisher
- General Fire Products
- Emergency/Exit Lighting
- Fire Alarm
- Fire Sprinkler
- Kitchen Fire Suppression
- Fire Suppression
- Residential
- Emergency Communication
- Monitoring
- Vehicle Suppression

THE FIRE & SECURITY EXPERTS

Koorsen Fire & Security boasts the most knowledgeable team in the life safety industry, training all technicians and sales associates in its nationally acclaimed corporate training center. This one-of-a-kind training facility incorporates both a classroom style approach coupled with hands-on training to better familiarize Koorsen associates with all of the systems and services it provides customers. With NICET certified instructors, the training center provides new and veteran associates with the expert training needed to offer customers unparalleled support and expert code knowledge. Koorsen sets the standard in training and has provided training to thousands of others in the life safety industry.



Koorsen Fire & Security Training Center



Classroom Training



Hands-on Training

KOORSEN CUSTOMER PROFILE

Koorsen Fire & Security has the knowledge, expertise and bandwidth to service any business – regardless of its size or industry focus. With \$10 million worth of product liability protection and bonding capabilities and a fleet of nearly 500 service trucks, Koorsen’s qualifications far exceed the majority of other fire protection and security companies. Koorsen’s current customer base contains more than 75,000 businesses and can be found in roughly 200,000 properties across the United States, serving everyone from mom-and-pop shops to Fortune 500 companies.



MONITORING CAPABILITIES



Koorsen Fire & Security uses three state-of-the-art, U.L. listed monitoring facilities with complete back-up systems capable of monitoring all of your life safety systems. With extensively trained associates, our monitoring centers provide 24-hour rapid response to emergencies.

WHY KOORSEN?

Our business is saving yours from the destruction of fire and intrusion in addition to offering customized solutions for effective communications. Keeping your people, your building, and your assets protected is a priority, while also ensuring that your business is compliant with state, industry and federal regulations.



We've been doing it since 1946, and we do it with the intensity, thoroughness, and dedication you'd expect from a company with a critical mission.

- We install and maintain the right fire and security protection for your facility, whether that's a restaurant or healthcare operation, a manufacturing plant or your own home.
- Our technicians are fully certified and receive ongoing training in our own training center at our national headquarters.
- We maintain a staff of NICET- certified design engineers and project managers who are masters of designing systems that meet code and bring you the most appropriate system for your operation and your budget.
- We give you one number to call when you need service. Whether you utilize just one of our services or a full range, you work with one Koorsen account manager who can answer all your questions and make sure your fire protection and security needs are met.
- We have a location near you, providing responsive customer service and a hometown business.
- We offer all the high-quality products you could want, configured and maintained for your needs by experienced associates.

Every point mentioned is important, but what really sets us apart is something more. It's our company culture of honesty and our devotion to doing the job right every time that most ensures our customers stay safe. It's the reason they choose Koorsen to provide total protection from one source and protect what they've worked so hard for.

Monroe County United Ministries, Inc.
MCUM Balance Sheet Monroe County United Ministries
As of December 31, 2018

| | <u>Dec 31, 18</u> |
|--|-------------------|
| ASSETS | |
| Current Assets | |
| Checking/Savings | |
| 1005-1 · MB-General Chk(operating fund) | 70,481.10 |
| 1015-1 · MB-ES Chk (restricted funds) | 58,959.89 |
| 1030-1 · MB-Market (operating funds) | 3,609.93 |
| 1040 · IUCU- (cash reserve) | 9,543.50 |
| 1042 · ONB IDA Accounts | 837.12 |
| 1043-1 · ONB IDA - Grant, Queen -Depos | 90.00 |
| 1043-2 · ONB IDA - Grant, Queen Match | 200.00 |
| 1044-1 · ONB IDA-Bennett, Fredrick-Depos | 1,000.03 |
| 1044-2 · ONB IDA- Bennett, Fredrick-Matc | 2,224.03 |
| 1045-1 · ONB IDA-Cain, Maiko-Match | 200.00 |
| 1045-2 · ONB IDA-Cain, Maiko-Deposit | 90.12 |
| 1046-1 · ONB IDA-Kernan, Alisha-Match | 1,380.05 |
| 1046-2 · ONB-Kernan, Alisha-Deposit | 480.02 |
| 1047-1 · ONB IDA-Terrell, Angela -Match | 3,345.78 |
| 1047-2 · ONB IDA-Terrell, Angela-Deposit | 836.47 |
| 1048-1 · ONB IDA-Sereni, Corinne-Match | 4,000.15 |
| 1048-2 · ONB IDA-Sereni, Corinne-Deposit | 1,325.06 |
| 1049-1 · ONB IDA-Watson, Natalie-Match | 1,960.07 |
| 1049-2 · ONB IDA-Watson, Natalie-Depoist | 620.03 |
| 1051 · HL-Priority (board restricted) | 156,126.06 |
| 1059 · ONB-Wealth Mgmt | 546,887.16 |
| 1060 · Petty Cash | 50.00 |
| 1061 · Gift Cards | 250.00 |
| 1062 · Safran MorphoTrust Escrow | 261.60 |
| Total Checking/Savings | <u>864,758.17</u> |
| Accounts Receivable | |
| 1100 · Accounts receivable | 73,223.63 |
| Total Accounts Receivable | <u>73,223.63</u> |
| Other Current Assets | |
| 1140 · Prepaid Blackbaud | 380.33 |
| 1150 · Prepaid Insurance | 3,350.26 |
| 1170 · Prepaid Pest Control | 310.42 |
| 1180 · Prepaid Koorsen Fire & Security | 100.12 |
| 1190 · Prepaid Web Hosting, Membership | 105.40 |
| Total Other Current Assets | <u>4,246.53</u> |
| Total Current Assets | <u>942,228.33</u> |
| Fixed Assets | |
| 1200 · Land | 10,000.00 |
| 1210 · Buildings | 2,016,024.45 |
| 1250 · Land Improvements | 16,510.67 |
| 1260 · Equipment | 447,090.28 |
| 1300 · Accumulated depreciation | (1,520,071.68) |

Monroe County United Ministries, Inc.

MCUM Balance Sheet

Monroe County United Ministries

As of December 31, 2018

| | <u>Dec 31, 18</u> |
|--|-----------------------------------|
| Total Fixed Assets | 969,553.72 |
| Other Assets | |
| 1054 · MCUM Fund-Community Foundation | <u>209,982.46</u> |
| Total Other Assets | <u>209,982.46</u> |
| TOTAL ASSETS | <u><u>2,121,764.51</u></u> |
| LIABILITIES & EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Accounts Payable | |
| 2070 · Accounts Payable | <u>13,618.10</u> |
| Total Accounts Payable | 13,618.10 |
| Credit Cards | |
| 2500 · CardMember Services | <u>1,318.18</u> |
| Total Credit Cards | 1,318.18 |
| Other Current Liabilities | |
| 2000 · Taxes Payable | 4,310.64 |
| 2010 · ONB IDA Main Account | 17,751.81 |
| 2040 · MCRL Liability | 228.80 |
| 2060 · Salaries Payable | 78,199.64 |
| 2080 · Pension Expense Payable | 1,388.83 |
| 2200 · Accrued Vacation | <u>19,711.56</u> |
| Total Other Current Liabilities | <u>121,591.28</u> |
| Total Current Liabilities | <u>136,527.56</u> |
| Total Liabilities | 136,527.56 |
| Equity | |
| 2900 · Temporarily restrict net asset | 23,974.76 |
| 2950 · Permanently restrict net assets | 210,345.96 |
| 2990 · Residual Equity (RE) | 2,230,379.58 |
| Net Income | <u>(479,463.35)</u> |
| Total Equity | <u>1,985,236.95</u> |
| TOTAL LIABILITIES & EQUITY | <u><u>2,121,764.51</u></u> |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Mother Hubbard's Cupboard

Address: 1100 W. Allen St.

Phone: 812-355-6843

E-Mail: development@mhcfoodpantry.org

Website: www.mhcfoodpantry.org

President of Board of Directors: Julia Dotson

Name of Executive Director: Amanda Nickey

Phone: 812-355-6843

E-Mail: Amanda@mhcfoodpantry.org

Name and Title of Person to Present Proposal to the Committee: Amanda Nickey

Phone: 812-355-6843

E-Mail: Amanda@mhcfoodpantry.org

Name of Grant Writer: Sarah Cahillane

Phone: 812-355-6843

E-Mail: development@mhcfoodpantry.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [x] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 6 | 2 | 500 |

AGENCY 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’s (MHC) mission is to increase access to healthy food for all people in need in ways that cultivate dignity, self-sufficiency, and community. MHC provides healthy, wholesome food to people in need, and equips people with the skills, knowledge, and tools to grow and prepare their own food, making nutritious food and wholesome meals more accessible. MHC’s five programs (Food Pantry, Garden Education, Nutrition Education, Advocacy, and Tool Share) form a holistic approach to tackling the issues of hunger and food insecurity. All MHC programs focus on serving low-income families at or below 200% of the federal poverty line. MHC’s Food Pantry Program is the largest in the region and last year distributed 178,000 bags of healthy groceries to people in need.

PROJECT INFORMATION

Project Name: Technology Upgrade

Total cost of project: \$9,695

Requested amount of JHSSF funding: \$9,695

Total number of City residents anticipated to be served by this project in 2019: 9,074

Total number of clients anticipated to be served by this project in 2019: 14,635

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Mother Hubbard's Cupboard (MHC) requests \$9,695 to purchase 3 laptop computers, 3 iMac desktop computers, an iPad, and software to increase organizational efficiency. The laptop computers will be used by staff in our newest program, The Hub Garden Corps. In 2015, MHC received funding from Jack Hopkins to upgrade some of our office technology, and in 2017, we received additional funding from another source to upgrade the rest of our staff members' computers. We have yet to upgrade the intern/volunteer computers. These computers are dated 2008, making them over 10 years old. These machines struggle to perform everyday functions. One computer is so dated it cannot connect to our cloud based storage. When using these old computers, one can expect to have wait patiently, as performing simple tasks takes a lot of time. We estimate we lose a total of 2 hours per week per most used computer waiting for programs and documents to open, save, and edit (approximately 8 hours/week, a total of \$416/month at \$13/hour). Estimates for upgrading/improving the current equipment fall in the range of \$400-\$500, roughly half the price of new equipment, which come with warranty, last longer, and provide more efficient operations than refurbished equipment.

Address where project will be housed: 1100 W. Allen St.

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 to capital improvements to real estate and if you do not own the property at which the project 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.

N/A

Note: Funds will not be disbursed until all requisite variances or approvals are obtained.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

N/A

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

MHC will purchase the items upon notification of receipt of the funding and submit the invoice as soon as the purchase is completed.

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

MHC uses a combination of in-kind donations, volunteer support, and collaborative partnerships to maximize programming efficiency. Funding sources are equally diverse, ranging from national, regional, and local grants, individual donors and corporations. MHC receives discounted technology support from Tech Soup and we often use volunteers to help maintain the systems and set up program software needs, such as the Tool Share patron-accessible web page and the patron surveys. Not only will the requested equipment enhance MHC's award winning programming, it will allow for quick, easy, and frequent communication with the donors, volunteers, and patrons that contribute to MHC.

contributions, or volunteers.

FUNDING PRIORITIES -- RANKED

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

Yes No

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

| | Item | Cost |
|------------------------|--|----------------|
| Priority #1 | 1 iPad 3 iMac desktop computers 3 Macbook Air Laptops 6 Office for Macs through Tech Soup 1 Adobe suite through Tech Soup | \$9,695 |
| Priority #2 | 1 iPad 2 iMac desktop computers 2 Macbook Air laptops 4 Office for Macs through Tech Soup 1 Adobe suite through Tech Soup | \$6,636 |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

MHC provides emergency food, nutrition and gardening education, and makes gardening and kitchen tools available at no cost to patrons. Mother Hubbard's Cupboards programming addresses the needs outlined in both the Service Community Assessment of Needs (SCAN) and the Housing and Neighborhood Development Department's (HAND) 2015-2019 Consolidated Plan. Specifically, MHC aligns with NA-50, Non-Housing Community Development Needs-91.215 (f) (Strategy 5, 1&3), which states HAND's priority to "Provide funding to non-profit organizations that serve low income individuals/families with their basic emergency needs: food, shelter and health care." And, "Provide funding to non-profit organizations that provide valuable services to improve quality of life." (P.6) MHC's programming develops the self-sustainability of community members who participate in educational services. Community members who participate in the Nutrition and Garden programs gain skills that reduce their dependency on emergency food providers. MHC also helps low-income community members access the "Essentials" as outlined in SCAN (section 7). From 2013-2019, demand for our services increased 95% and is expected to rise an additional 2% in 2019. This increase has required more time and money spent maintaining large necessities and our patron environment. Providing a safe, vibrant, and welcoming environment for patrons is a core tenet of MHC's practices.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

The purchase of new equipment will increase operational efficiency for many years to come. Much of our equipment is over 10 years old, and we anticipate the same durability of new equipment. We currently operate on Apple equipment, using Mac laptops and desktops. This equipment is not only durable, but has proven to be some of the most effective and efficient office-based operating systems. New computers will help us continue to expand our reach for years to come.

LONG-TERM BENEFITS (200 words or less)

MHC's programming would significantly benefit from a technology upgrade. Our programs have grown significantly since the move to the new facility in June 2013, and demand continues to grow. According to Feeding America, an estimated 25,260 food insecure people live in Monroe County. Monroe County's food insecurity rate was 17.6% in 2017, higher than the national average of 12.9% (This is the most recent data available for our area). Food insecurity in adults has been linked to an increased risk of diabetes and chronic cardiovascular illnesses. Children who live in food insecure households have an increased likelihood of being sick, having growth problems, and being at risk for obesity.

Research suggests that nutrition education can be an effective instrument to addressing barriers to unhealthy eating. Gardening can also have a positive impact on participants' physical, mental, and nutritional health. MHC provides the Monroe County's largest food pantry, innovative garden and nutrition education programming, and the first food security tool share program of its kind.

MHC is a key contributor to the national dialogue on food security and we are often asked to participate in Webinars and present at national conferences. Updated technology would allow MHC to continue to be an innovative leader in food justice and anti-hunger work.

Explain how your program will have broad and long-lasting benefits for our community.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

New technology will save MHC time and money by increasing program efficiency. With new equipment, we assume the time lost waiting for slow computers will be eliminated. MHC projects a 2% increase in services in 2019. Time saved with new technology will allow MHC to focus our limited resources and staff time on meeting the increased need of the community.

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.

Mother Hubbard's Cupboard

As the largest direct-service provider of emergency groceries in our community, MHC fills a vital role in the continuum of care for lower-income individuals, including homeless and temporarily sheltered community members. On average, MHC's food pantry serves 3,800 people each week, or two patrons per minute for the 30 hours that we are open each week. Children make up approximately 38% of our patrons, and adults over the age of 55 make up 25% of our patrons. These especially vulnerable populations, children and the elderly, make up nearly two thirds of those patrons who struggle to find enough food to eat without our pantry. MHC's pantry is determined to feed the many veterans, pregnant and nursing mothers, single mothers, and disabled individuals who seek out our services every weekday. Food assistance allows families and individuals to allocate limited resources toward housing costs, childcare, healthcare, and other "non-negotiables," preventing homelessness and other crises.

The Hub Garden Corps is our newest program, created in partnership with Youth Services Bureau of Monroe County. Participants will receive training in planning, starting, and maintaining a garden. They will sell their produce at our monthly Hub Farm Stand, taking place onsite throughout the growing season. Participants are paid for their work, and in addition to the farming skills they will learn, time and financial management skills will be learned.

MHC requests this assistance to update the technology used in our shared spaces. The computer in the kitchen classroom is over 10 years old, and cannot be connected wirelessly to our printer, requiring staff to be available for printing needs, if interns would like to print work from this computer. This computer is used to create and store the thousands of recipes we hand out in the pantry each year, in addition to being a main point of access to our online Tool Share catalog. Our pantry computer is used to log the thousands of hours of volunteer work that keeps The Hub running. This computer is also 10+ years old, and it is not uncommon to see volunteers lined up to input their hours. Because the computer is so slow, each interaction takes several minutes. The third desktop to be replaced is our intern computer in the office. This computer will house the Adobe Suite, allowing us create our bi-annual newsletter, posters for events, media for events, and other fundraising necessities. Also over 10 years old, it is now rarely used, because it is so slow and cannot even maintain the most updated version of Adobe, because of its age. The requested laptops will replace the intern laptops that are dated 2008, and will be used by our new Garden Corps employees. The iPad will be used for youth in the gardening program, allowing for easy access to educational resources when working outside. The iPad will also be used to make donating at offsite events and fundraisers easier, thereby increasing our ability to raise money.

| 2019 Jack Hopkins Budget | | |
|---------------------------------------|--------------|--------------------|
| Item and Quantity | Price | Total |
| 1 iPad | \$329.00 | \$329.00 |
| 3 iMac desktop computers | \$1,099 | \$3,297 |
| 3 Macbook Air laptop computers | \$1,199 | \$3,597 |
| 3 Apple Care for desktops | \$169 | \$507 |
| 3 Apple Care for laptops | \$249 | \$747 |
| 6 Office Suite from Tech Soup | \$174 | \$1,044 |
| Adobe Suite | \$174 | \$174 |
| Total | | \$ 9,695.00 |

Here's what's in your bag.

Free delivery and free returns.



iPad Wi-Fi 32GB - Silver

1

\$329.00

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Order by 6pm, delivers:
Tomorrow - Fastest
Mon, Apr 1 - Free
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Ships to store. Available Mon, Apr 1 at Apple The Fashion Mall at Keystone
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13-inch MacBook Air - Space Gray

Mother Hubbard's Cupboard
1 ▼ **\$1,199.00**

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AppleCare+ for iMac

Automatically registered with your Apple hardware.

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Mon, Apr 1 - Free

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Subtotal

\$8,477.00

Shipping

FREE

Estimated tax for: [47401 v](#)

\$593.39

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Total

\$9,070.39

379

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AirPods with Wireless Charging Case
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New
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\$159.00

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Apple Pencil
\$99.00

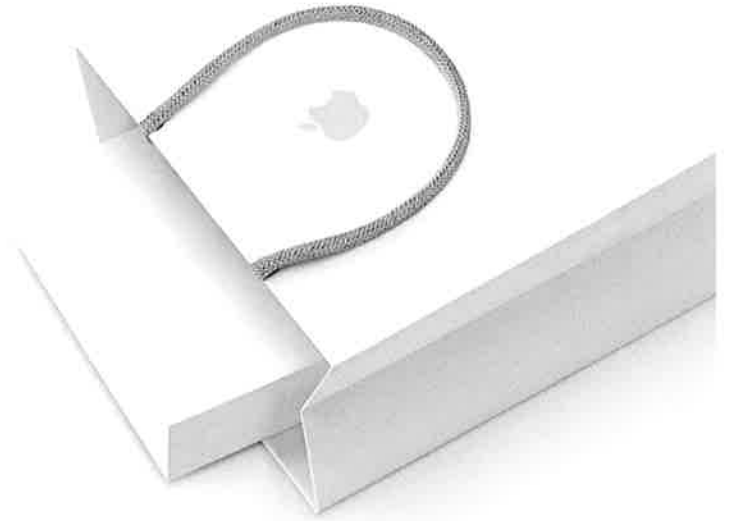
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- Genius Bar
- Today at Apple
- Youth Programs
- Apple Store App
- Refurbished and Clearance
- Financing
- Apple GiveBack
- Order Status
- Shopping Help

For Education

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- Shop for College

For Business

- Apple and Business
- Shop for Business

Government

- Shop for Government
- Shop for Veterans & Military

For Healthcare

- Apple in Healthcare
- Health on Apple Watch
- Health Records on iPhone

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- Education
- Environment
- Inclusion and Diversity
- Privacy
- Supplier Responsibility

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- Apple Store Account
- iCloud.com

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- Apple Leadership
- Job Opportunities
- Investors
- Events
- Contact Apple

More ways to shop: Visit an Apple Store, call 1-800-MY-APPLE, or find a reseller.

Your work is vital. We are raising funds to support it.

(/growth-capital-campaign)

Cart

Mother Hubbard's Cupboard

[CHANGE ORGANIZATION \(/MY-ACCOUNT?RETURNURL=/CART#MY_ORGANIZATIONS\)](/MY-ACCOUNT?RETURNURL=/CART#MY_ORGANIZATIONS)

 Office Office for Mac

(/Products/--LS-3013--Microsoft)

AVAILABILITY

Available

QUANTITY

6

ADMIN FEE

Remove

\$29.00

TOTAL

\$174.00



Your work is vital. We are raising funds to support it.

Adobe Creative Cloud All Apps Plan 1-Year Individual Membership

- Access to Discounted Rates

(/Products/--G-49388--
AdobeCloud)

AVAILABILITY

Available

QUANTITY

1

Remove

ADMIN FEE

\$5.00

TOTAL

\$5.00

SUBTOTAL

\$179.00

CLEAR CART

UPDATE TOTALS

CHECK OUT

MORE TECHSOUP

+

GET IN TOUCH

+

FOLLOW US



(/rss-

(https://www.techsoup.org/Products/Adobe-Creative-Cloud-All-Apps-Plan-1-Year-Individual-Membership)

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SUBSCRIBE (/SUBSCRIBE-TO-OUR-FREE-NEWSLETTERS)

Description

Adobe Creative Cloud is a collection of creative design desktop applications, mobile apps, and services for designing, developing, and publishing graphical, video, audio, and interactive content for print, the web, and mobile devices.

This offer provides access to discounted rates for a Creative Cloud All Apps plan individual membership for one user. You'll receive a minimum of 60 percent off Adobe's current rates for the first year and approximately 40 percent off every year after. See the **Details and Service Costs** tab for more information.

What You'll Pay Adobe

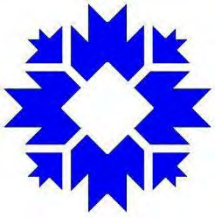
After you request this offer through TechSoup, **you'll pay Adobe \$19.99 per month or \$239.88 for the first year for the discounted membership.**

Mother Hubbard's Cupboard

| | MHC | <u>Dec 31, 18</u> |
|-----------------------------------|-----|-------------------|
| ASSETS | | |
| Current Assets | | |
| Checking/Savings | | |
| Other Bank Cash | | 5,777.24 |
| Checking | | 70,823.73 |
| Savings 1008023356 | | 23,162.03 |
| Petty Cash | | 100.00 |
| Charles Schwab Investment Acct | | <u>1,000.00</u> |
| Total Checking/Savings | | 100,863.00 |
| Accounts Receivable | | |
| Pledges Receivable | | |
| 2015 Pledges Receivable | | 611.76 |
| 2016 Pledges Receivable | | 3,399.07 |
| 2017 Pledges Receivable | | 17,185.12 |
| 2018 Pledges Receivable | | 35,544.91 |
| 2019 Pledges Receivable | | 49,370.33 |
| 2020 Pledges Receivable | | 41,507.00 |
| 2021 Pledges Receivable | | 33,537.00 |
| 2022 Pledges Receivable | | <u>21,307.00</u> |
| Total Pledges Receivable | | <u>202,462.19</u> |
| Total Accounts Receivable | | 202,462.19 |
| Other Current Assets | | |
| Allow Doubtful Accts - Pledges | | <u>-22,700.00</u> |
| Total Other Current Assets | | <u>-22,700.00</u> |
| Total Current Assets | | 280,625.19 |
| Fixed Assets | | |
| Building | | 348,581.80 |
| Landscaping | | 1,175.00 |
| Apple Computers | | 7,294.00 |
| Furniture | | 9,177.15 |
| Phone System | | 3,828.00 |
| Awning | | 4,230.00 |
| Dumpster Enclosure | | 3,500.00 |
| Stoves (2) | | 1,300.14 |
| Stainless Steel Sink | | 1,550.00 |
| Walk-In Cooler/Freezer Combo | | 26,905.00 |
| Equipment | | 35,522.42 |
| Equipment-VAN | | 42,824.50 |
| Garden Shed | | 3,280.00 |
| Leasehold Improvements | | 79,677.97 |
| Accumulated Depreciation | | -145,230.15 |

| | |
|--|--------------------------|
| Total Fixed Assets | <u>423,615.83</u> |
| TOTAL ASSETS | <u><u>704,241.02</u></u> |
| LIABILITIES & EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Accounts Payable | |
| Accounts Payable | 2,643.12 |
| Total Accounts Payable | <u>2,643.12</u> |
| Other Current Liabilities | |
| Accrued Payroll | 6,089.87 |
| Unearned Revenue | 49,640.00 |
| Total Other Current Liabilities | <u>55,729.87</u> |
| Total Current Liabilities | 58,372.99 |
| Long Term Liabilities | |
| ONB Mortgage Payable | 51,731.65 |
| Total Long Term Liabilities | <u>51,731.65</u> |
| Total Liabilities | 110,104.64 |
| Equity | |
| Retained Earnings | 577,848.55 |
| Net Income | 16,287.83 |
| Total Equity | <u>594,136.38</u> |
| TOTAL LIABILITIES & EQUITY | <u><u>704,241.02</u></u> |

| | | MHC | <u>Jan - Dec 18</u> |
|--------------------------------|----------------------------|--|----------------------------|
| Ordinary Income/Expense | | | |
| | Income | | |
| | | Contributions Income | |
| | | Total Contributions Income | 180,690.39 |
| | | Grants | |
| | | Total Grants | 94,609.86 |
| | | In-kind Income | |
| | | HHFB Donated Food | <u>159,963.03</u> |
| | | Total In-kind Income | 159,963.03 |
| | | Insurance Claims | 5,431.65 |
| | | Misc. Income, Tools & T-Shirts | 54.25 |
| | | Total Special Events | <u>134,524.42</u> |
| | | Total Income | <u>575,273.60</u> |
| | Gross Profit | | <u>575,273.60</u> |
| | Expense | | |
| | | Total Automobile Expense | 1,617.20 |
| | | Building R&M | 3,091.07 |
| | | Conference/Travel | 1,679.24 |
| | | Conferences/Trainings | 298.93 |
| | | Depreciation | 24,097.68 |
| | | Dues & Fees | 787.88 |
| | | Equipment R&M | 934.50 |
| | | FDE Fundraising Direct Expense | |
| | | Total FDE Fundraising Direct Expense | 8,096.66 |
| | | HHFB SMC | 38,997.72 |
| | | In-Kind Donated Services/Assets | |
| | | HHFB In-Kind Food | <u>159,963.03</u> |
| | | Total In-Kind Donated Services/Assets | 159,963.03 |
| | | Insurance | |
| | | Total Insurance | 7,417.48 |
| | | Misc. Expenses | -122.94 |
| | | Payroll Expenses | |
| | | Total Payroll Expenses | 267,819.64 |
| | | Postage and Delivery | 921.93 |
| | | Professional fees | |
| | | Total Professional fees | 14,150.00 |
| | | Supplies | |
| | | Total Supplies | 14,816.67 |
| | | Utilities | |
| | | Total Utilities | 12,416.64 |
| | | Interest Expense ONB LOC | 2,002.44 |
| | | Total Expense | <u>558,985.77</u> |
| | Net Ordinary Income | | <u>16,287.83</u> |
| Net Income | | | <u><u>16,287.83</u></u> |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: My Sister's Closet of Monroe County

Address: 414 S. College Ave., Bloomington, IN 47403

Phone: (812) 333-7710

E-Mail: Director@Sisterscloset.org

Website: www.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 and Title of Person to Present Proposal to the Committee:

Phone: Sandy Keller, Executive Director

E-Mail: Director@SistersCloset.org

Name of Grant Writer:

Phone: Sandy Keller, Executive Director

E-Mail: Director@SistersCloset.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 3 | 2 | 350+ |

AGENCY 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

Project Name: Ensuring Continued Client Services with the Help of the Cloud

Total cost of project: \$26,635.95

Requested amount of JHSSF funding: \$21, 635.95

Total number of City residents anticipated to be served by this project in 2019: 975

Total number of clients anticipated to be served by this project in 2019: 225

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

My Sister's Closet, with the assistance of our full-time, volunteer Systems Analyst, and our team of Kelley interns, has been working diligently over the past year to create an online income stream by creating an online Ecwid store and an E-Bay account. Based on preliminary test sales results to date of both the Ecwid Store found on our website and our E-Bay account, we feel certain we can increase our organization's overall thrift store sales by 25% annually if our project is managed properly and consistently. The ending result, will be our organization's continued ability to provide free services to the clients living in poverty, who are making real efforts to become self-sufficient.

With the majority of the set-up completed for this project, the only thing left is to hire a staff member dedicated to managing and maintaining the project. (Without a consistent staff member in place, the project will not be able to continue.) My Sister's Closet is requesting (first year, pilot) funds for an employee to act as an Online Sales coordinator to regularly manage our online sales presence.

My Sister's Closet is respectfully requesting funding of \$25,000 towards this pilot project so we may fund the salary of an Online Sales Coordinator and an additional \$1,635.95 in supplies to launch it. Once established, we believe the online sales realized from this project will eventually fund this position itself as well as increase our overall store sales by 25%, approximately \$54,308/year in net sales (based on 2018 figures.).

Address where project will be housed: 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 - My Sister's Closet is currently renting the space where our project will take place.

If you are seeking funds to capital improvements to real estate and if you do not own the property at which the project 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.

My Sister's Closet has rented this space since November 2014. Our lease ends (officially) October 2019, however, we negotiating an extension with the Executive Director, of the Convention Center and also Amanda Barge, president of the Commission's Office. We believe our lease will be extended to allow us to continue our rent here for at least 6 months. If we move, this project will be relocated elsewhere to continue.

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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*): Online Sales will result directly from this project to self-support it as an independent project, as part of our non-profit's mission.

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

For supplies listed, within 1 month of grant notice.

For salary of hired employee, monthly until close of grant window.

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

The expected deliverable and planned outcome - Sales realized from success of the cloud presence.

FISCAL LEVERAGING (*100 words or less*)

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

Continued In-kind Donations: My Sister's Closet is blessed with an abundance of in-kind donations in excellent condition. Many are sought after, sellable items. We will simply make further use of these wonderful, in-kind donations to sell online as continued and funding for this project. Currently, we have dedicated more than 200 items to get the online inventory started. Since our donations come in daily, we do not anticipate running out of a supply of online stock. Given that, it is reasonable to conclude that once the online stores have been launched successfully and supported with a trained coordinator, the sales will continue.

Staff Support: MSC currently works with a volunteer, full-time, Systems Analyst. This gentleman has dedicated his hours to supervising the new employee in this position. Additionally, we have 2 full time store staff members on this committee to make it successful.

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|---|--------------------|
| Priority #1 | 1st Year Salary of Online Sales Coordinator (If only partial funding is available, we will still use it.) | \$25,000 |
| Priority #2 | Pro Table Top Polaroid Photo Studio Kit – Already purchased, need to reimburse volunteer. | \$34.95 |
| Priority #3 | Backgrounds, sheeting of various colors; Background material @ \$80/roll in green, white, black; poster board | \$365 |
| Priority #4 | 16" x 16" Table Top Photo Photography Studio Lighting Light Tent Kit in a Box x 2 x \$58 | \$116 |
| Priority #5 | Mannequin and Human Model Stands (2) | \$160 |
| Priority #6 | Cost of Ecwid Monthly subscription paid through April 2019 | \$150 |
| Priority #7 | Light Fixtures - 3 @ \$25; Photography Bulbs @ \$45 x 3 | \$210 |
| Priority #8 | Packaging materials - Approximately \$50/month | \$600 |
| | | |
| TOTAL REQUESTED | Salary + Materials to photograph and ship items sold. | \$26,635.95 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

According to SCAN data, the women we serve fall into the following critical categories of need:

Education:

- “A person’s level of educational attainment is related to his or her level of employment and income.” (46); Those without high school diploma or GED are worse off in 2010 than 2013, and data suggests that the education threshold to enter higher-paying positions has grown over time (49)

Poverty rates:

- Poverty rate by educational attainment shows that 45.4% of those without a high school diploma are living in poverty (50);

Employment:

- Percentages of low-income households (under \$15k) looking for work was 48% (71), meaning that low-income mothers are part of the group that would most benefit from MSC services
- Percent of households who are having a problem finding a job that pays enough to meet the family’s basic needs has increased across all but the highest income levels, increasing the need for job training. (71/72)

Self-sufficiency:

- Based on the Self-Sufficiency Standard, women living below the median female income in Monroe county are in danger of falling below the self-sufficiency standard, particularly for single-led female families with a preschool child or with more than one child (86)

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

Our pilot project is designed to be self-funded once it is launched. This means, the need to additional funding after the first year will be unnecessary.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Clients served by My Sister's Closet. These clients are: at-risk women living in poverty who have the desire to move closer to economic self-sufficiency. My Sister's Closet provides essential career development tools, job training, mentoring, advocacy services, and professional interview attire to help them find employment and fit into culture of a new position and retain it. 85% of those we serve meet with job success in less than 6 weeks, and over 2200 women have been assisted to find jobs to date. The circumstances of these women include: Issues of homelessness (70%), domestic violence (65%), illness, divorce, job loss, recent incarceration or economic recovery. The majority lack the basic education, networks, and the necessary 21st Century skill sets required to compete in today's job market without assistance. 92% of clients are residents of Bloomington.

Because this will allow us to additional funds to expand, continue, and increase the numbers of those we currently serve, this funding will assist us in creating a positive, social, and lasting economic outcomes for these clients and their families; thus allowing their children to access increases programming services and education opportunities, putting them on an upward, economic trajectory into multiple generations.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

The outcome indicators of our project's success will be measured in 3 ways:

- 1) Regular, direct online sales designed to fund our new employee's salary
- 2) Additional income dedicated towards funding our agency's mission to serve low income women seeking self-sufficiency through gainful and meaningful employment. Goal is to eventually have the income allowing us to serve an additional 54 clients directly per year and an additional 200 indirect clients per year.
- 3) Continued, long-term sales and a new established customer/donor base as the reputation of our online presence (and our mission) expands. Goal is to reach 25% of current brick and mortar sales.
- 4) Increased public education about the needs of women and children living in poverty and at-risk circumstances. Our online presence will be designed to educate as well as sell, allowing customers to support our mission and to make meaningful contributions to those in need of economic assistance.

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.

We invite the Jack Hopkins Committee members to go online and look at these projects, as they have been created to date.

To visit our Ecwid store, please go to:

<https://sisterscloset.org/online-store/>

- Please note, this is a work in process, and has taken hundreds of hours to establish to structure and program. The process involves the use of models, photography, lots of volunteers, interns, lighting equipment, pricing research ... etc.

To visit our MSC Merchandise store:

<https://msccampaign.itemorder.com/closed>

Our merchandise store for the MSC brand. This is temporarily closed, but can be reopened for view.

To visit our EBay store:

<https://www.ebay.com/usr/mysistersclosetmc>

Our E-Bay store.

PROJECT BUDGET DETAILING THE USE OF HOPKINS FUND - 2019

| Budget Items | Item | Cost |
|----------------------------|---|--------------------|
| | 1st Year Salary of Online Sales Coordinator (If only partial funding is available, we will still use it.) | \$25,000 |
| | Pro Table Top Polaroid Photo Studio Kit – Already purchased, need to reimburse volunteer. | \$34.95 |
| | Backgrounds, sheeting of various colors; Background material @ \$80/roll in green, white, black; poster board | \$365 |
| | 16" x 16" Table Top Photo Photography Studio Lighting Light Tent Kit in a Box x 2 x \$58 | \$116 |
| | Mannequin and Human Model Stands (2) | \$160 |
| | Cost of Ecwid Monthly subscription paid through April 2019 | \$150 |
| | Light Fixtures - 3 @ \$25; Photography Bulbs @ \$45 x 3 | \$210 |
| | Packaging materials - Approximately \$50/month | \$600 |
| | Laptop for new Online Store Coordinator - Apple MacBook Pro (15" Retina, Touch Bar, 2.2GHz 6- Core Intel Core i7, 16GB RAM, 256GB SSD) - Silver (Latest Model) | \$2149 |
| | Copier - HP LaserJet Enterprise M725 Monochrome All- In-One Printer, Copier, Scanner, Fax, M725Z found at Office Depot available for: \$5599.99. | \$5599. |
| | | |
| TOTAL REQUESTED | Salary + Materials to photograph and ship items sold. | \$34,383.95 |

Short Form
Return of Organization Exempt From Income Tax

2017

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-EZ and its instructions is at www.irs.gov/form990.

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

A For the 2017 calendar year, or tax year beginning , 2017, and ending , 20

| | | |
|--|--|---|
| 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 | C Name of organization MY SISTER'S CLOSET OF MONROE COUNTY Number and street (or P.O. box, if mail is not delivered to street address) Room/suite 4533 HERITAGE WOODS City or town, state or province, country, and ZIP or foreign postal code Bloomington, IN 47401-9311 | D Employer identification number 35-2050048 E Telephone number (812) 332-9295 F Group Exemption Number ▶ |
|--|--|---|

G Accounting Method: Cash Accrual Other (specify) ▶ _____

I Website: ▶ _____

H Check if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

J Tax-exempt status (check only one) - 501(c)(3) 501(c)() (insert no.) 4947(a)(1) or 527

K Form of organization: Corporation Trust Association Other _____

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B) below) are \$500,000 or more, file Form 990 instead of Form 990-EZ ▶ \$ **185,779**

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I)
Check if the organization used Schedule O to respond to any question in this Part I

| | | | | |
|-------------------|--|--|-----------|---------|
| Revenue | 1 | Contributions, gifts, grants, and similar amounts received | 1 | 36,381 |
| | 2 | Program service revenue including government fees and contracts | 2 | 148,601 |
| | 3 | Membership dues and assessments | 3 | |
| | 4 | Investment income | 4 | |
| | 5a | Gross amount from sale of assets other than inventory | 5a | |
| | 5b | Less: cost or other basis and sales expenses | 5b | |
| | 5c | Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) | 5c | |
| | 6 | Gaming and fundraising events | | |
| | a | Gross income from gaming (attach Schedule G if greater than \$15,000) | 6a | |
| b | Gross income from fundraising events (not including \$ _____ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000) | 6b | 797 | |
| c | Less: direct expenses from gaming and fundraising events | 6c | | |
| d | Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c) | 6d | 797 | |
| 7a | Gross sales of inventory, less returns and allowances | 7a | | |
| b | Less: cost of goods sold | 7b | | |
| 7c | Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) | 7c | | |
| 8 | Other revenue (describe in Schedule O) | 8 | | |
| 9 | Total revenue. Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8 ▶ | 9 | 185,779 | |
| Expenses | 10 | Grants and similar amounts paid (list in Schedule O) | 10 | |
| | 11 | Benefits paid to or for members | 11 | |
| | 12 | Salaries, other compensation, and employee benefits | 12 | 85,867 |
| | 13 | Professional fees and other payments to independent contractors | 13 | 30,310 |
| | 14 | Occupancy, rent, utilities, and maintenance | 14 | 40,530 |
| | 15 | Printing, publications, postage, and shipping | 15 | |
| | 16 | Other expenses (describe in Schedule O) | 16 | 35,859 |
| 17 | Total expenses. Add lines 10 through 16 ▶ | 17 | 192,566 | |
| Net Assets | 18 | Excess or (deficit) for the year (Subtract line 17 from line 9) | 18 | (6,787) |
| | 19 | Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return) | 19 | 38,819 |
| | 20 | Other changes in net assets or fund balances (explain in Schedule O) | 20 | |
| | 21 | Net assets or fund balances at end of year. Combine lines 18 through 20 ▶ | 21 | 32,032 |

Part V Other Information (Note the Schedule A and personal benefit contract statement requirements in the instructions for Part V.) Check if the organization used Schedule O to respond to any question in this Part V

Table with columns for question number, question text, and Yes/No response boxes. Rows include questions 33 through 45b regarding organizational activities, financials, and compliance.

46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I

Table with Yes/No columns and row 46 with 'X' in No column.

Part VI Section 501(c)(3) organizations only

All section 501(c)(3) organizations must answer questions 47 - 49b and 52, and complete the tables for lines 50 and 51.

Check if the organization used Schedule O to respond to any question in this Part VI

47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year?
48 Is the organization a school as described in section 170(b)(1)(A)(ii)?
49a Did the organization make any transfers to an exempt non-charitable related organization?
49b If "Yes," was the related organization a section 527 organization?

Table with Yes/No columns and rows 47, 48, 49a, 49b with 'X' marks.

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

Table with 5 columns: (a) Name and title of each employee, (b) Average hours per week devoted to position, (c) Reportable compensation, (d) Health benefits, contributions to employee benefit plans, and deferred compensation, (e) Estimated amount of other compensation.

f Total number of other employees paid over \$100,000

51 Complete this table for the organization's five highest compensated independent contractors who each received more than \$100,000 of compensation from the organization. If there is none, enter "None."

Table with 3 columns: (a) Name and business address of each independent contractor, (b) Type of service, (c) Compensation.

d Total number of other independent contractors each receiving over \$100,000

52 Did the organization complete Schedule A? Note: All section 501(c)(3) organizations must attach a completed Schedule A

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.

Sign Here: Marryanne Pelic, Signature of officer, Date, Marryanne Pelic, President, Type or print name and title

Paid Preparer Use Only: Kevin R Keough CPA, Preparer's signature, Date 11-06-2018, Check self-employed, PTIN P01011609, Firm's name Keough Accounting and Tax Service, Firm's address 525 South Walker Suite 106 Bloomington IN 47403, Phone no. 812-334-7610

May the IRS discuss this return with the preparer shown above? See instructions

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

OMB No. 1545-0047

My Sister's Closet

2017

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 for instructions and the latest information.

Open to Public Inspection

Name of the organization

Employer identification number

MY SISTER'S CLOSET OF MONROE COUNTY

35-2050048

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 or 990-EZ).)
- 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 in 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) | | | | | | |
| Total | | | | | | |

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

Table with 7 columns: (a) 2013, (b) 2014, (c) 2015, (d) 2016, (e) 2017, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Tax revenues levied for the organization's benefit; 3 The value of services or facilities furnished by a governmental unit; 4 Total. 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 Public support. Subtract line 5 from line 4.

Section B. Total Support

Table with 7 columns: (a) 2013, (b) 2014, (c) 2015, (d) 2016, (e) 2017, (f) Total. Rows include: 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 Total support. Add lines 7 through 10; 12 Gross receipts from related activities, etc. (see instructions); 13 First five 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

Table with 3 columns: Description, 2017 percentage, 2016 percentage. Rows include: 14 Public support percentage for 2017 (line 6, column (f) divided by line 11, column (f)); 15 Public support percentage from 2016 Schedule A, Part II, line 14; 16a 33 1/3% support test - 2017; 16b 33 1/3% support test - 2016; 17a 10%-facts-and-circumstances test - 2017; 17b 10%-facts-and-circumstances test - 2016; 18 Private foundation.

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

Table with 7 columns: (a) 2013, (b) 2014, (c) 2015, (d) 2016, (e) 2017, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Gross receipts from admissions, merchandise sold or services performed; 3 Gross receipts from activities that are not an unrelated trade or business; 4 Tax revenues levied for the organization's benefit; 5 The value of services or facilities furnished by a governmental unit; 6 Total; 7a Amounts included on lines 1, 2, and 3 received from disqualified persons; 7b Amounts included on lines 2 and 3 received from other than disqualified persons; 7c Add lines 7a and 7b; 8 Public support.

Section B. Total Support

Table with 7 columns: (a) 2013, (b) 2014, (c) 2015, (d) 2016, (e) 2017, (f) Total. Rows include: 9 Amounts from line 6; 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources; 10b Unrelated business taxable income; 10c Add lines 10a and 10b; 11 Net income from unrelated business activities not included in line 10b; 12 Other income; 13 Total support.

14 First five 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

Table with 3 columns: Line number, Percentage, and % sign. Rows: 5 Public support percentage for 2017; 6 Public support percentage from 2016 Schedule A, Part III, line 15.

Section D. Computation of Investment Income Percentage

Table with 3 columns: Line number, Percentage, and % sign. Rows: 7 Investment income percentage for 2017; 8 Investment income percentage from 2016 Schedule A, Part III, line 17.

19a 33 1/3% support tests - 2017. 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 - 2016. 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 in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

| | Yes | No |
|--|-----|----|
| 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i> | | |
| 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i> | | |
| 3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i> | | |
| 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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i> | | |
| c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i> | | |
| 4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i> | | |
| b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i> | | |
| c 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)? <i>If "Yes," explain in Part VI 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.</i> | | |
| 5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, 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).</i> | | |
| b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document? | | |
| c Substitutions only. Was the substitution the result of an event beyond the organization's control? | | |
| 6 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? <i>If "Yes," provide detail in Part VI.</i> | | |
| 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (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? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i> | | |
| 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i> | | |
| 9a 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))? <i>If "Yes," provide detail in Part VI.</i> | | |
| b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i> | | |
| c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i> | | |
| 10a 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)? <i>If "Yes," answer 10b below.</i> | | |
| b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i> | | |

Part IV Supporting Organizations (continued)

| | Yes | No |
|---|-----|----|
| 11 Has the organization accepted a gift or contribution from any of the following persons? | | |
| a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization? | | |
| b A family member of a person described in (a) above? | | |
| c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI . | | |

Section B. Type I Supporting Organizations

| | Yes | No |
|--|-----|----|
| 1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? 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 directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year. | | |
| 2 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? 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. | | |

Section C. Type II Supporting Organizations

| | Yes | No |
|---|-----|----|
| 1 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)? 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). | | |

Section D. All Type III Supporting Organizations

| | Yes | No |
|--|-----|----|
| 1 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? | | |
| 2 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? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s). | | |
| 3 By reason of the relationship described in (2), 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? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard. | | |

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).

a The organization satisfied the Activities Test. Complete **line 2** below.

b The organization is the parent of each of its supported organizations. Complete **line 3** below.

c The organization supported a governmental entity. Describe in **Part VI** how you supported a government entity (see instructions).

2 Activities Test. **Answer (a) and (b) below.**

| | Yes | No |
|--|-----|----|
| a 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? 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. | | |
| b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? 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. | | |

3 Parent of Supported Organizations. **Answer (a) and (b) below.**

| | | |
|--|--|--|
| a 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? Provide details in Part VI . | | |
| b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard. | | |

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.

| Section A - Adjusted Net Income | | (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 | Adjusted Net Income (subtract lines 5, 6 and 7 from line 4). | 8 | |

| Section B - Minimum Asset Amount | | (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 | Total (add lines 1a, 1b, and 1c) | 1d | |
| e Discount 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 1-1/2% 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 .035. | 6 | |
| 7 | Recoveries of prior-year distributions | 7 | |
| 8 | Minimum Asset Amount (add line 7 to line 6) | 8 | |

| Section C - Distributable Amount | | | Current Year |
|----------------------------------|---|---|--------------|
| 1 | Adjusted net income for prior year (from Section A, line 8, Column A) | 1 | |
| 2 | Enter 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 | Distributable Amount. 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)

| Section D - Distributions | Current Year |
|--|--------------|
| 1 Amounts paid to supported organizations to accomplish exempt purposes | |
| 2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity | |
| 3 Administrative expenses paid to accomplish exempt purposes of supported organizations | |
| 4 Amounts paid to acquire exempt-use assets | |
| 5 Qualified set-aside amounts (prior IRS approval required) | |
| 6 Other distributions (describe in Part VI). See instructions. | |
| 7 Total annual distributions. Add lines 1 through 6. | |
| 8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions. | |
| 9 Distributable amount for 2017 from Section C, line 6 | |
| 10 Line 8 amount divided by Line 9 amount | |

| Section E - Distribution Allocations (see instructions) | (i) Excess Distributions | (ii) Underdistributions Pre-2017 | (iii) Distributable Amount for 2017 |
|---|-----------------------------|--|---|
| 1 Distributable amount for 2017 from Section C, line 6 | | | |
| 2 Underdistributions, if any, for years prior to 2017 (reasonable cause required - explain in Part VI). See instructions. | | | |
| 3 Excess distributions carryover, if any, to 2017 | | | |
| a | | | |
| b From 2013 | | | |
| c From 2014 | | | |
| d From 2015 | | | |
| e From 2016 | | | |
| f Total of lines 3a through e | | | |
| g Applied to underdistributions of prior years | | | |
| h Applied to 2017 distributable amount | | | |
| i Carryover from 2012 not applied (see instructions) | | | |
| j Remainder. Subtract lines 3g, 3h, and 3i from 3f. | | | |
| 4 Distributions for 2017 from Section D, line 7: \$ | | | |
| a Applied to underdistributions of prior years | | | |
| b Applied to 2017 distributable amount | | | |
| c Remainder. Subtract lines 4a and 4b from 4. | | | |
| 5 Remaining underdistributions for years prior to 2017, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI . See instructions. | | | |
| 6 Remaining underdistributions for 2017. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI . See instructions. | | | |
| 7 Excess distributions carryover to 2018. Add lines 3j and 4c. | | | |
| 8 Breakdown of line 7: | | | |
| a Excess from 2013 | | | |
| b Excess from 2014 | | | |
| c Excess from 2015 | | | |
| d Excess from 2016 | | | |
| e Excess from 2017 | | | |

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.)

Lined area for providing supplemental information.

**SCHEDULE G
(Form 990 or 990-EZ)**

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities My Sister's Closet 15-0047

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

▶ Attach to Form 990 or Form 990-EZ.

▶ Go to www.irs.gov/Form990 for the latest instructions.

2017

Open to Public Inspection

Name of the organization

MY SISTER'S CLOSET OF MONROE COUNTY

Employer identification number

35-2050048

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a Mail solicitations
- b Internet and email solicitations
- c Phone solicitations
- d In-person solicitations
- e Solicitation of non-government grants
- f Solicitation of government grants
- g Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? Yes No

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

| (i) Name and address of individual or entity (fundraiser) | (ii) Activity | (iii) Did fundraiser have custody or control of contributions? | | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in col. (i) | (vi) Amount paid to (or retained by) organization |
|---|---------------|--|----|-----------------------------------|---|---|
| | | Yes | No | | | |
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |
| 7 | | | | | | |
| 8 | | | | | | |
| 9 | | | | | | |
| 10 | | | | | | |
| Total | | | | | | |

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

| | | (a) Event #1 | (b) Event #2 | (c) Other events | (d) Total events |
|---|--|--------------|--------------|------------------|---------------------------------|
| | | (event type) | (event type) | (total number) | (add col. (a) through col. (c)) |
| Revenue | 1 Gross receipts | | | | |
| | 2 Less: Contributions | | | | |
| | 3 Gross income (line 1 minus line 2) | | | | |
| Direct Expenses | 4 Cash prizes | | | | |
| | 5 Noncash prizes | | | | |
| | 6 Rent/facility costs | | | | |
| | 7 Food and beverages | | | | |
| | 8 Entertainment | | | | |
| | 9 Other direct expenses | | | | |
| | 0 Direct expense summary. Add lines 4 through 9 in column (d) ▶ | | | | |
| 1 Net income summary. Subtract line 10 from line 3, column (d) ▶ | | | | | |

Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

| | | (a) Bingo | (b) Pull tabs/instant bingo/progressive bingo | (c) Other gaming | (d) Total gaming (add col. (a) through col. (c)) |
|---|--|--|--|--|--|
| | | 1 Gross revenue | | | |
| Direct Expenses | 2 Cash prizes | | | | |
| | 3 Noncash prizes | | | | |
| | 4 Rent/facility costs | | | | |
| | 5 Other direct expenses | | | | |
| | 6 Volunteer labor | <input type="checkbox"/> Yes _____% <input type="checkbox"/> No | <input type="checkbox"/> Yes _____% <input type="checkbox"/> No | <input type="checkbox"/> Yes _____% <input type="checkbox"/> No | |
| 7 Direct expense summary. Add lines 2 through 5 in column (d) ▶ | | | | | |
| 8 Net gaming income summary. Subtract line 7 from line 1, column (d) ▶ | | | | | |

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? Yes No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? Yes No

b If "Yes," explain: _____

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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 990-EZ.
▶ Go to www.irs.gov/Form990 for the latest information.

My Sister's Closet 0047

2017

**Open to Public
Inspection**

Name of the organization

MY SISTER'S CLOSET OF MONROE COUNTY

Employer identification number

35-2050048

01. Description of other expenses (Part I, line 16)

| Description | Amount |
|-------------------------|--------|
| Depreciation from 4562 | 2,831 |
| SUPPLIES | 3,785 |
| Dues and Subscriptions | 839 |
| BANK CHARGES | 3,275 |
| Promotion | 11,667 |
| INSURANCE | 2,580 |
| OFFICE SUPPLIES | 3,561 |
| Repairs and maintenance | 5,382 |
| contribution | 125 |
| Other expense | 1,169 |
| Meals | 645 |

02. Description of other assets (Part II, line 24)

| Category | Beginning of Year | End of Year |
|--------------------|-------------------|-------------|
| DEPRECIABLE ASSETS | 6,255 | 9,877 |
| Security deposit | 5,550 | 0 |

03. Description of total liabilities (Part II, line 26)

| Category | Beginning of Year | End of Year |
|-----------|-------------------|-------------|
| PAYROLL | 1,582 | 0 |
| SALES TAX | 237 | 0 |
| rounding | 3 | 1 |

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2017)

Depreciation and Amortization
(Including Information on Listed Property)

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to your tax return.

▶ Go to www.irs.gov/Form4562 for instructions and the latest information.

Attachment
Sequence No. **179**

| | | |
|--|--|---|
| Name(s) shown on return MY SISTER'S CLOSET OF MONROE COU | Business or activity to which this form relates FORM 990EZ - 1 | Identifying number 35-2050048 |
|--|--|---|

Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

| | | |
|--|------------------------------|------------------|
| 1 Maximum amount (see instructions) | 1 | |
| 2 Total cost of section 179 property placed in service (see instructions) | 2 | |
| 3 Threshold cost of section 179 property before reduction in limitation (see instructions) | 3 | |
| 4 Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0- | 4 | |
| 5 Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions | 5 | |
| 6 (a) Description of property | (b) Cost (business use only) | (c) Elected cost |
| 7 Listed property. Enter the amount from line 29 | 7 | |
| 8 Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7 | 8 | |
| 9 Tentative deduction. Enter the smaller of line 5 or line 8 | 9 | |
| 10 Carryover of disallowed deduction from line 13 of your 2016 Form 4562 | 10 | |
| 11 Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instructions) | 11 | |
| 12 Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11 | 12 | |
| 13 Carryover of disallowed deduction to 2018. Add lines 9 and 10, less line 12 | 13 | |

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property.) (See instructions.)

| | | |
|---|-----------|--|
| 14 Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions) | 14 | |
| 15 Property subject to section 168(f)(1) election | 15 | |
| 16 Other depreciation (including ACRS) | 16 | |

Part III MACRS Depreciation (Don't include listed property.) (See instructions.)

Section A

| | | |
|--|-----------|--------------------------|
| 7 MACRS deductions for assets placed in service in tax years beginning before 2017 | 17 | 1,901 |
| 8 If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here | | <input type="checkbox"/> |

Section B - Assets Placed in Service During 2017 Tax Year Using the General Depreciation System

| (a) Classification of property | (b) Month and year placed in service | (c) Basis for depreciation (business/investment use only-see instructions) | (d) Recovery period | (e) Convention | (f) Method | (g) Depreciation deduction |
|---|--------------------------------------|--|---------------------|----------------|------------|----------------------------|
| 19a 3-year property | #567 | | | | | |
| b 5-year property | | | | | | |
| c 7-year property Statement | | | | | | 930 |
| d 10-year property | | | | | | |
| e 15-year property | | | | | | |
| f 20-year property | | | | | | |
| g 25-year property | | | 25 yrs. | | S/L | |
| h Residential rental property | | | 27.5 yrs. | MM | S/L | |
| i Nonresidential real property | | | 39 yrs. | MM | S/L | |

Section C - Assets Placed in Service During 2017 Tax Year Using the Alternative Depreciation System

| | | | | | | |
|-----------------------|--|--|---------|----|-----|--|
| 20a Class life | | | | | S/L | |
| b 12-year | | | 12 yrs. | | S/L | |
| c 40-year | | | 40 yrs. | MM | S/L | |

Part IV Summary (See instructions.)

| | | |
|--|-----------|-------|
| 21 Listed property. Enter amount from line 28 | 21 | |
| 22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations -see instructions | 22 | 2,831 |
| 23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs | 23 | |

For Paperwork Reduction Act Notice, see separate instructions.

Federal Supporting Statements

2017 PG01

Name(s) as shown on return

FEIN

MY SISTER'S CLOSET OF MONROE COUNTY

35-2050048

Form 4562 - Line 19c

Statement #567

| Basis | RP | CV | Method | Deduction |
|--------------|----|----|--------|--------------------------|
| 3,860 | 7 | HY | 200 DB | 552 |
| 2,643 | 7 | HY | 200 DB | <u>378</u> |
| Total | | | | <u><u>930</u></u> |

990

Overflow Statement

2017

Page 1

Name(s) as shown on return

FEIN

MY SISTER'S CLOSET OF MONROE COUNTY

35-2050048

donations - grants

| Description | Amount |
|---------------|------------------|
| Donations | \$ 26,537 |
| Grants | 9,844 |
| Total: | \$ 36,381 |

COMPENSATION

| Description | Amount |
|---------------|------------------|
| WAGES | \$ 76,965 |
| PAYROLL TAXES | 8,902 |
| Total: | \$ 85,867 |

Professional fees and contract labor

| Description | Amount |
|-------------------|------------------|
| professional fees | \$ 810 |
| Management fees | 29,500 |
| Total: | \$ 30,310 |

OCCUPANCY

| Description | Amount |
|------------------|------------------|
| RENT - Occupancy | \$ 33,958 |
| UTILITIES | 6,572 |
| Total: | \$ 40,530 |

* Item was disposed
of during current year.

Depreciation Detail Listing

990 EZ
For your records only

My Sister's Closet
2017

PAGE 1

Name(s) as shown on return

Social security number/EIN

MY SISTER'S CLOSET OF MONROE COUNTY

35-2050048

| No. | Description | Date | Cost | Basis Adjustment | Business percentage | Section 179 | Bonus depreciation | Depreciable Basis | Life | Method | Rate | Prior Depreciation | Current Depreciation | Accumulated Depreciation | AMT Current |
|---------------|-----------------------|----------|---------------|---------------------|------------------------|----------------|-----------------------|----------------------|------|-----------|-------|-----------------------|-------------------------|-----------------------------|----------------|
| 1 | DEPRECIABLE ASSETS | 01012008 | 804 | | 100.00 | | | 804 | 7 | | | 804 | | 804 | |
| 2 | Store Equipment 2011 | 06302011 | 2,526 | | 100.00 | | | 2,526 | 7 | 200 DB HY | 8.93 | 2,188 | 226 | 2,414 | 309 |
| 3 | Store equipment | 06302013 | 474 | | 100.00 | | | 474 | 7 | 200 DB HY | 8.93 | 326 | 42 | 368 | 58 |
| 4 | Depreciable assets 20 | 06302014 | 1,164 | | 100.00 | | | 1,164 | 7 | 200 DB HY | 12.49 | 655 | 145 | 800 | 143 |
| 5 | Depreciable assets - | 06302015 | 4,451 | | 100.00 | | | 4,451 | 7 | 200 DB HY | 17.49 | 1,726 | 778 | 2,504 | 669 |
| 6 | Equipment 2016 | 01162016 | 2,899 | | 100.00 | | | 2,899 | 7 | 200 DB HY | 24.49 | 414 | 710 | 1,124 | 710 |
| 7 | Shelving 2017 | 04032017 | 3,860 | | 100.00 | | | 3,860 | 7 | 200 DB HY | 14.29 | | 552 | 552 | 552 |
| 8 | Morgantown Home Servi | 08242017 | 2,643 | | 100.00 | | | 2,643 | 7 | 200 DB HY | 14.29 | | 378 | 378 | 378 |
| Totals | | | 18,821 | | | | | 18,821 | | | | 6,113 | 2,831 | 8,944 | 2,819 |

Land Amount
Net Depreciable Cost

18,821

CY 179 and CY Bonus
TOTAL CY Depr including 179/bonus

2,831

ST ADJ: **419**

Keough Accounting and Tax Service My Sister's Closet

525 South Walker Suite 106
Bloomington, IN 47403
krk.cpa@comcast.net
Phone: (812)334-7610 | Fax:

November 06, 2018

MY SISTER'S CLOSET OF MONROE COUNTY
4533 HERITAGE WOODS
Bloomington, IN 47401-9311

Subject: Preparation of 2017 Tax Returns

MY SISTER'S CLOSET OF MONROE COUNTY:

Thank you for choosing Keough Accounting and Tax Service to assist with the 2017 taxes for MY SISTER'S CLOSET OF MONROE COUNTY. This letter confirms the terms of the engagement and outlines the nature and extent of the services we will provide.

We will prepare the 2017 federal and state income tax returns for MY SISTER'S CLOSET OF MONROE COUNTY. We will depend on management to provide the information we need to prepare complete and accurate returns. We may ask management to clarify some items but will not audit or otherwise verify the data submitted.

We will perform accounting services only as needed to prepare the tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for management to clarify some of the information submitted. We will inform management of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if there are any concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on the behalf of MY SISTER'S CLOSET OF MONROE COUNTY, the alternative selected by management.

Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

We will return the original records to management at the end of this engagement. Store these records, along with all supporting documents, canceled checks, etc., in a secure location in case these items are needed later to prove accuracy and completeness of a return. We retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare the 2017 tax returns will conclude with the delivery of the completed returns to management (if paper-filing) or with the tax matters partner's signature and our subsequent submittal of the tax return (if e-filing). If management has not selected to file the returns with our office, management will be solely responsible to file the returns with the appropriate taxing authorities. The tax matters partner should review all tax-return documents carefully before signing them.

To affirm that this letter correctly summarizes the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.

Thank you for the opportunity to be of service. For further assistance with your tax needs, contact our office at (812)334-7610.

Sincerely,

Kevin R Keough CPA
Keough Accounting and Tax Service

Accepted By:

Officer

Date

3-20-2019

Sandy Keller
My Sister's Closet
414 S College Ave
Bloomington, IN 47403

RE: Jack Hopkins Grant Support letter My Sister's Closet

To the 2019 Jack Hopkins Committee:

Dear Councilmember Allison Chopra (Chair), Councilmember Dorothy Granger, Citizen Kaye Lee Johnson, Citizen Nidhi Krishnan, Councilmember Isabel Piedmont-Smith, Councilmember Andy Ruff, and Councilmember Susan Sandberg:

My Sister's Closet exists to provide women in our community with job seeking and job retention skills by partnering with other agencies in our community, by providing one-on-one mentoring and by providing clothing as a way for women to integrate into the workforce and bolster self-esteem.

They are a small agency with a mighty mission and I urge you to award Jack Hopkins funds to My Sister's so that they can continue to provide this important service to women in our community.



Ron Smith, MSW

Care Manager
Area 10 Agency on Aging
812 876-3383



April 1, 2019

Jack Hopkins Social Services Funding Committee
401 N Morton St.
Suite 110
Bloomington, IN 47404

Dear Jack Hopkins Social Services Funding Committee,

I am writing this letter in support of My Sister's Closet and their current grant application to receive support for intern training in regards to their new avenues for online sales. My Sister's Closet has been a strong partner of the Kelley Institute for Social Impact (KISI) and its student organizations. In the last few years, My Sister's Closet has engaged multiple student groups within KISI, including SEEK, CLD, and student interns.

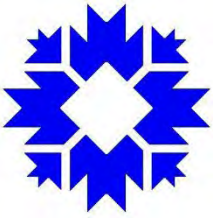
In the fall of 2018, staff at My Sister's Closet engaged Social Enterprise Engagement at Kelley (SEEK) as clients for a Case Competition. They assisted students in crafting a case study based on their needs. They then spent a day with Kelley students, evaluating the recommendations of each team that worked on the case. Through this experience, students were able to practice their consulting skills and present recommendations.

My Sister's Closet has also engaged students from Civic Leadership Development (CLD), a student organization focused on increasing business students' awareness of the issues in their community through volunteerism. CLD has brought student volunteers to numerous events at My Sister's Closet, giving them a chance to see the thrift store in operation and learn about the issues facing women entering the workforce in Bloomington. The time these students spend volunteering encourages them to take more of an interest in their community.

Over the last few years, My Sister's Closet has also engaged many Kelley School of Business students as interns, serving in a variety of roles such as Thrift Store Management, Database Maintenance, Marketing, and Sales. Students find the experience they gain while working at My Sister's Closet valuable. My hope is that this grant will allow My Sister's Closet to provide much needed training to student interns.

Sincerely,

Courtney Bidwell
Director, Kelley Institute for Social Impact
Indiana University, Kelley School of Business
cbidwel@indiana.edu | 812-855-3049



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: New Hope for Families

Address: PO Box 154 Bloomington IN 47402

Phone: 812-334-9840

E-Mail: director@newhope4families.org

Website: newhope4families.org

President of Board of Directors: Elizabeth McCrea

Name of Executive Director: Emily Pike

Phone: 812-369-7760

E-Mail: director@newhope4families.org

Name and Title of Person to Present Proposal to the Committee:

Phone: Emily Pike

E-Mail: director@newhope4families.org

Name of Grant Writer: Emily Pike

Phone: 812-369-7760

E-Mail: director@newhope4families.org

AGENCY INFORMATION

Lead Agency: New Hope for Families

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 6 | 10 | 80 |

AGENCY 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 helps families impacted by homelessness gain and maintain stable housing and provides stable, nationally accredited early childhood programming aimed at breaking the cycle of homelessness and poverty.

PROJECT INFORMATION

Project Name: Playing, Learning, and Growing

Total cost of project: \$33,484.80

Requested amount of JHSSF funding: \$21,384.80

Total number of City residents anticipated to be served by this project in 2019: 75

Total number of clients anticipated to be served by this project in 2019: 75

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

New Hope seeks a partnership with the Jack Hopkins Social Services Funding Committee to provide opportunities for playful learning and summer enrichment to up to 45 children aged six weeks to 18 years, most of whom are impacted by homelessness. School-aged children will participate in a hybrid school break program, sometimes attending programming in house at New Hope and sometimes attending camps in the community. Camps will be chosen by children according to their interests with guidance from parents and staff. We anticipate that children will select camps at The Boys and Girls Club, the YMCA, WonderLab, Kid City, Ivy Tech, Camp Dragonfly, and others. Infants, toddlers, and preschoolers will participate in playful learning activities at The Nest, under the supervision of talented and dedicated educators.

We seek an investment of \$21,384.80 to underwrite the cost of camp attendance and classroom equipment to support children's school break and year-round learning.

Address where project will be housed: 301 W. 2nd Street and 311 W 2nd Street 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 to capital improvements to real estate and if you do not own the property at which the project 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.*

We are not seeking funds for capital improvements.

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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

N/A

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*):

New Hope has designated funds to cover in-house summer programming for up to seven children aged 5-18 years and coordination of summer camp participation for up to seven additional children. This includes funding for staffing, transportation, materials, and enrichment activities. The total cost of this programming is \$8,600.

We additionally anticipate funding totaling of \$4,500 for music and art instruction to begin in the summer and continue through the school year. These grants are pending.

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

New Hope has funds on hand to purchase the required items. We will submit reimbursements on a monthly basis until the full amount of the award has been disbursed. We anticipate spending the funds by August 15 and submitting the final reimbursement by September 15.

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.

Have secured gifts to cover the cost of staffing for both school-aged summer break programming and year-round early childhood programming. The funding we are requesting is supplemental to that primary funding source.

In both programs, we rely on volunteers and interns as well as trained staff members. We have strong partnerships with the IU School of Education and the IU Undergraduate Career Services Office, which help us fill those volunteer and intern positions with qualified individuals.

We have additionally requested funds totaling \$4,500.

FUNDING PRIORITIES -- RANKED

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

Yes No

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

| | Item | Cost |
|-----------------|--|--------------------|
| Priority #1 | Summer Enrichment Camp Scholarships (7 children/week X \$150/week X 11 weeks of summer) | \$11,550 |
| Priority #2 | Tablets (2 for early childhood classrooms, 2 for remote case management use; 4 X \$516) | \$2,064.96 |
| Priority #3 | Early Childhood Gross Motor Equipment | \$4,090.59 |
| Priority #4 | Early Childhood Art and Dramatic Play Equipment and Materials | \$3,679.25 |
| TOTAL REQUESTED | | \$21,384.80 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Both the SCAN and the Consolidated Plan encourage assistance to homeless families, which New Hope provides in the form of shelter, case management, programming for school-aged children, and nationally accredited early childhood care and education.

The Consolidated Plan specifically recognizes the need to fund agencies providing services to homeless families. As the only shelter serving intact homeless families regardless of composition or religious beliefs, New Hope is uniquely equipped to assist families on their path from homelessness to housing stability. By assisting families not only to find housing but to address the underlying causes of homelessness and through collaboration with other service providers, last year we were able to help more than 85% of families into sustainable housing. This is significantly higher than the state average of 52%.

The United Way’s SCAN 2012 acknowledges a strong and growing need for childcare and early childhood education opportunities, particularly among low-income families. New Hope’s early childhood center provides high-quality, full-day care and education, ensuring children enter kindergarten ready for success while simultaneously meeting parents’ needs. Children from low-income backgrounds often begin school with deficits, having heard perhaps 30 million fewer words than their middle-income counterparts¹. By providing excellent early childhood education, we are working to ensure they have a chance to be the members of their families to break the cycle of homelessness and poverty.

¹ Betty Hart and Todd R. Risley. “The Early Catastrophe.” 2004. Available at http://www.gsa.gov/graphics/pbs/The_Early_Catastrophe_30_Million_Word_Gap_by_Age_3.pdf

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

For six years, New Hope has operated an informal summer enrichment program for children served by our shelter program, The Roof at New Hope. Because of structural changes to our buildings, we do not anticipate having sufficient space to fully meet the need for summer care/programming for a period of two years. When the hospital moves, New Hope will relocate its services to a new site, where we anticipate constructing sufficient space to run summer programming for school-aged children. For the intervening two years, we plan to supplement the services we are able to provide with summer camps for school-aged children.

All materials and equipment have been selected for maximum life and many carry warranties of 10 or 20 years. We do not anticipate needing to replace these materials for several years.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

We understand that children from low-income families are less likely to participate in summer enrichment activities (often because of cost barriers) and also suffer from summer learning loss at a far greater rate than children from middle-income families. Further, we know that these children are also far less likely to have access to arts and outdoor programming, while research indicates that at-risk children engaged in the arts and outdoor activities are likely to have better academic performance, higher career goals, and to be more engaged in their communities. Further, children impacted by homelessness are likely to struggle in areas of social and emotional development, and these enrichment activities are proven tools for addressing those challenges in a positive, proactive way, allowing children space to succeed and safe spaces to learn.

For early childhood, we know that the first five years are crucial to young children's growth and development. By providing high quality materials for young learners, we are setting them up for early success in kindergarten and beyond.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

Outcome indicators:

1. Number of children who participate in summer enrichment programming.
2. Number of children who have access to high quality learning materials.
3. Number of children who increase kindergarten-readiness skills.

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.

This request is intended to support the educational and enrichment programming offered to children at New Hope for Families.

Roughly half of the amount requested is underwrite the cost of summer camps for up to seven or eight children (a little more than half the number we anticipate serving). We recently converted a large multi-purpose room into additional office for staff use, limiting the amount of space available for use in our summer enrichment program. Though we feel this year-round use of the space is most efficient, it does diminish our capacity to provide in-house programming to children for two summers. We anticipate solving this problem by creating a sort of hybrid summer program that serves some children in-house but allows others to take advantage of camps in the community. We will draw on our strong relationships with these other agencies to place as many children in camps as possible at a low cost. Because space in these camps is not always available, and many children may move into shelter immediately before or even during the school break, we will reserve space in our smaller, in-house program for children unable to attend camp. We anticipate that most children will spend some weeks at camps and some weeks in our in-house program.

The remainder of funds requested go to support the purchase of educational equipment and materials. Two tablets will be used by teachers in early childhood classrooms to complete child developmental evaluations and communicate with parents (tablets are not intended for use by young children). Two additional tablets will be used by case managers to complete family meetings in alternative spaces, freeing up meeting space for summer enrichment programming.

Dramatic play, art, and gross motor equipment will be used in early childhood classrooms year-round according to the curricular needs of the moment as determined by classroom teachers. High quality materials are one of the hallmarks of excellent early childhood education and are essential to maintaining The Nest's national accreditation.

Financial Information

| New Hope for Families | |
|--|----------------------|
| Statement of Financial Position | |
| As of March 27, 2019 | |
| | Total |
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| 10100 NHFF Checking (IUCU) | 120,807.94 |
| 10250 Friends & Family (IUCU) | 10,005.63 |
| 10300 Nest Checking (ONB) | 23,977.46 |
| 10350 Payroll (ONB) DDA | 394.12 |
| 10400 NHFF Merchant Account (ONB) | 1,121.73 |
| 10500 NHFF Savings (IUCU) | 297.36 |
| 10700 Nest Savings (ONB) | 34,151.72 |
| 10800 Capital Campaign Funds (IUCU) | 427,354.51 |
| Total Bank Accounts | \$ 618,110.47 |
| Accounts Receivable | |
| 11000 A/R - Daycare Tuition | 3,408.00 |
| Total Accounts Receivable | \$ 3,408.00 |
| Other Current Assets | |
| 12000 Undeposited Funds | 10.00 |
| Total Other Current Assets | \$ 10.00 |
| Total Current Assets | \$ 621,528.47 |
| Fixed Assets | |
| 13000 Furniture and Equipment | 13,917.63 |
| Total Fixed Assets | \$ 13,917.63 |
| TOTAL ASSETS | \$ 635,446.10 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Other Current Liabilities | |
| 21000 Payroll Liabilities | 2,320.62 |
| Total Other Current Liabilities | \$ 2,320.62 |
| Total Current Liabilities | \$ 2,320.62 |
| Total Liabilities | \$ 2,320.62 |
| Equity | |
| 30000 Opening Balance Equity | 274,926.07 |
| 32000 Retained Earnings | 77,160.43 |
| Net Revenue | 281,038.98 |
| Total Equity | \$ 633,125.48 |
| TOTAL LIABILITIES AND EQUITY | \$ 635,446.10 |

| New Hope for Families | |
|--------------------------------------|----------------------|
| Statement of Activity | |
| July 1, 2018 - March 27, 2019 | |
| | Total |
| Revenue | |
| 41000 Earned Revenue | 94,465.10 |
| 42000 Unearned Revenue | 583,082.39 |
| Unapplied Cash Payment Revenue | 0.00 |
| Uncategorized Revenue | 0.00 |
| Total Revenue | \$ 677,547.49 |
| Gross Profit | \$ 677,547.49 |
| Expenditures | |
| 50000 Personnel Expenses | 295,198.81 |
| 60000 Non-Personnel Expenses | 58,231.40 |
| 66900 Reconciliation Discrepancies | 1,760.00 |
| Uncategorized Expenditure | 41,052.73 |
| Total Expenditures | \$ 396,242.94 |
| Net Operating Revenue | \$ 281,304.55 |
| Other Revenue | |
| 47000 Interest Earned | 665.88 |
| 48000 Other Revenue | 9.88 |
| Total Other Revenue | \$ 675.76 |
| Other Expenditures | |
| 65000 Other Expenses | 941.33 |
| Total Other Expenditures | \$ 941.33 |
| Net Other Revenue | -\$ 265.57 |
| Net Revenue | \$ 281,038.98 |

IRS Letter of Determination

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUN 22 2011

NEW HOPE FAMILY SHELTER INC
PO BOX 154
BLOOMINGTON, IN 47402

Employer Identification Number:
27-5077191
DLN:
17053073304041
Contact Person:
WILLIAM SCHRODER ID# 31694
Contact Telephone Number:
(877) 629-5500
Accounting Period Ending:
June 30
Public Charity Status:
170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
February 21, 2011
Contribution Deductibility:
Yes
Addendum Applies:
No

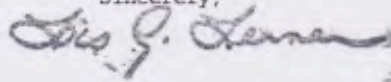
Dear Applicant:

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,



Lois G. Lerner
Director, Exempt Organizations

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: New Leaf – New Life

Address: P.O. Box 3453, Bloomington, IN 47402

Phone: (812) 727-4511

E-Mail: info@newleafnewlife.org

Website: www.newleafnewlife.org

President of Board of Directors: Lindsey Badger

Name of Executive Director: Lindsey Badger (acting)

Phone: Phone: (812) 322-9338

E-Mail: lindseybadger@gmail.com

Name and Title of Person to Present Proposal to the Committee: David Meyer

Phone: (812) 345-2322

E-Mail: dave@newleafnewlife.org

Name of Grant Writer: David Meyer

Phone: (812) 345-2322

E-Mail: dave@newleafnewlife.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 1 | 5 | >50 |

AGENCY 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 Leaf - New Life (NLNL) is a local volunteer-driven nonprofit whose mission is to support individuals during incarceration and in their transition back into our community. NLNL believes in supporting our neighbors that have been impacted by the criminal justice system. In this, we work to empower people towards self-advocacy; supporting one another in the spirit of solidarity not charity.

We provide social service programs and services to inmates in the Monroe County Correctional Center both during their time in jail and after release. Our Transition Support Center is focused on helping released inmates overcome the obstacles that they face in becoming productive, law-abiding citizens. The Transition Support Center has been enhanced this year by the hiring of a part-time volunteer coordinator. Our program in the jail this year has been enhanced by the addition of two life skills trainers and a social work trainer. The jail program provides a number of urgently needed services and is led by our President, Lindsey Badger who is also the chair of our program committee.

PROJECT INFORMATION

Project Name: DAY 1 RELEASE ASSISTANCE PROGRAM

Total cost of project: \$ 36,475

Requested amount of JHSSF funding: \$ 17,456

Total number of City residents anticipated to be served by this project in 2019: 1,270

Total number of clients anticipated to be served by this project in 2019: 2,541

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

This project creates a viable pilot of Day-1 support for inmates released from the Monroe County Correctional Center (jail). It also modernizes NLNL computer equipment (used both by residents and staff) and, lastly, provides a key job support pilot for released inmates.

We are asking the grant committee to fund additional hours for existing part-time staff to build our Day-1 support capabilities. This requires substantial efforts both inside the jail and outside, but the largest effort will be on the outside. Ex-inmates (and support staff) require adequate computer equipment and software to learn computer skills, complete resumes, conduct job searches and effectively communicate. We are asking for three additional desktop computers and related equipment and software to enhance our capabilities. Lastly, we are requesting support for a pilot of employment assistance through the hire a part-time staff person to recruit formerly incarcerated individuals to work in different industries (e.g., carpentry, automotive, restaurant, etc.). This employment liaison will meet and get to know individuals who are recently released and looking for work in order to serve as an intermediary for unemployed ex-offenders and potential employers. To assist ex-offenders with the initial work transition, NLNL would provide loaner tools and equipment to support early work in kitchens, carpentry and construction as well as lawncare services.

Address where project will be housed: At New Leaf – New Life’s existing Transition Support Center

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 to capital improvements to real estate and if you do not own the property at which the project 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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*): We have an already-operating office (our Transition Support Center) that will be leveraged for this project. We have a substantial (and growing) number of volunteers that will conduct much of the work on the Day-1 project. The 2018 Jack Hopkins Grant contributed to an inventory of key items used in this project including loaner day-1 phones, backpacks with key life essentials and bus passes. See the separate project budget for details. We estimate that our matching funds are **nearly equal** (at \$19,019) to the requested funding.

Please 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 “chunked” into two requests. An initial request will be submitted by October 15th that will contain the primarily details on the equipment purchased to support the project. There will be a final request (and report) that will be made just prior to December 3rd that will request reimbursement for other expenses (primarily staff) and report on the overall project.

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.

There will be substantial leveraging of existing resources through this project. Two of the three part-time staff used in the project are already NLNL employees (the “outside” volunteer coordinator and “inside” social work trainer) and need not be hired. The office space used will be our existing Transition Support Center and will not require the renting of additional space. NLNL extensively uses volunteers to conduct work and this will be especially so for the Release Assistance Program for Day-1. Volunteers will take over the bulk of the support of day-1 releasees after the program’s full implementation (after six month).

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|---|------------------|
| Priority #1 | Two part-time staff (one outside and the other inside the jail) that will develop training for volunteers that will take over for mentoring and assisting offenders on day-1 (and in preparation for day-1 of release). Initially, some of the mentoring and assisting of offenders will be done by these paid staff as procedures are developed and volunteers are prepared. | \$ 7,774 |
| Priority #2 | NLNL has a collection of old, second-hand PC computer equipment. Three new mid-level desktop computers with standard peripherals will be purchased as will a new laser printer with replacement cartridges. A subscription to Office 365 software will be purchased for all PCs for a year to support contemporary office automation usage by clients and staff. | \$ 4,316 |
| Priority #3 | A part-time staff person (employment liaison) will be hired for the six-month pilot. Selected tools and equipment will be provided on a loaner basis for key local industries of food service, carpentry, construction and lawn service. | \$ 5,366 |
| TOTAL REQUESTED | | \$ 17,456 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Recidivism in our jail is a big community problem. A study of the jail population reveals that the typical jail inmate has been there **five** times before. If it were not for recidivism, we would not have an overcrowded jail. And recidivism is expensive. It is estimated that the cost of apprehending an offender, prosecuting him, defending him, trying him, and incarcerating him is between 15 and 30 thousand dollars. And that doesn't include the social costs of his offenses before he is arrested and the costs of disrupting his or her family life.

This is complicated by the fact that the jail is primarily filled by those in poverty, those plagued with addictions and those facing mental health problems.

Everything we do, both in jail and after release, is aimed at improving the chances for success of our neighbors that have committed criminal offenses. We help them make the changes in their lives required to be productive citizens of our community.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

The expansion of hours of part-time staff is intended to get the day-1 effort off of the ground and into the hands of volunteers that will operationally manage it. The expenses for computer equipment are a one-time investment. The hiring of a part-time employment liaison and the provision of key tools and equipment on a loaner basis are part of a short-term pilot to demonstrate the efficacy of providing key employment assistance through our Transition Support Center.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Every person that we help to go straight is a long-term benefit to the community. He or she goes from being a burden to community resources to a contributing member of society. Given that we assist people at many stages of the recovery process—and may be involved in their situation for a relatively brief period of time—our services have the impact of moving individuals further in their journey to contributing to society. For some, our re-entry kits provide them the stability to start contemplating major life changes; for others, our assistance in transportation to work or work materials provides the necessary safety net to maintain and further their contributions.

Looking at this question another way, from the perspective of the organization's long-lasting benefit: obtaining funding every year is a challenge, and going into the new year in decent shape makes the long run possible. We have a passion for what we do and we intend to be here for the long run, but most of those with the greatest passion for our mission lack the means to provide funding support. Your support, covering many day-to-day costs, makes the long run possible for us.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

See below for critical success factors (CSFs) and related key performance indicators (KPIs) –

CSF 1: Establish Sustainable Day-1 Program

KPI 1A: Identified part-time staff conduct day-1 outside and inside volunteer training

KPI 1B: Written procedures are completed for program's continued operations

KPI 1C: 75% of jail releasees are met upon day-1 release and escorted to obtain resources

CSF 2: Equipment Modernization

KPI 2A: All identified equipment and software is procured and installed

CSF 3: Completion of Pilot of Employment Assistance

KPI 3A: Employment liaison hired

KPI 3B: Loaner system for tools and equipment created and inventory purchased

KPI 3C: Participants (75%) in Employment Assistance Program Complete Program Questionnaire

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.

Some time ago there was a program by a group entitled OASIS that provided “day-1” support for released inmates. We would like to reinstate this important concept. The first day of release is the hardest. Even if you have a plan, the barriers that you meet in the first hour of your release; not having clothes that fit, not having transportation, not having food and not having a way to contact others can make for an unsuccessful transition. Beyond this, lacking community infrastructure means that even if you make it through your first day, and the first day plan that was built in NLNL groups in the jail, having access to ongoing support to achieve the rest of your goals is lacking.

We will arrange to have every person who will be released in Monroe County who does not have a friend or family member to pick them up be met by a volunteer that will facilitate transportation for the ex-offender to our Transition Support Center (and around to other appropriate offices in the community). Upon arrival, they will be provided with clothes that are their size and weather appropriate, food, an activated loaner phone, a backpack of critical resources including hygiene, bus passes and bus maps, etc. The 2018 Jack Hopkins Grant award to NLNL provided funding for an inventory of loaner phones, backpacks (with supplies) and bus passes for use in this new project. A NLNL mentor will escort the person to critical services around town to make sure they meet their day-1 goals, and in many instances also serve as an example of a formerly incarcerated individual who has gotten past the day-1 anxiety and can be a peer-mentor. In cold or inclement weather, the recently released person will be left at a shelter if they do not have other housing arrangements. The recently released person will also schedule a meeting with their new mentor to meet one-on-one before a (participant incentivized) life-skills group in the NLNL office within two weeks of their release, and at least twice in the first month of the person's release. The recently released person will also be given the opportunity to complete their required community service.

Additionally, our employment liaison will compile an increasingly robust list of places who are willing to hire individuals with records and invite employers in the field to employee recruitment nights where employers will learn about tax incentives for hiring individuals with records and get to meet individuals that they may be able to employ.

**Day-1 Release Assistance Program
Budget for New Leaf - New Life (Jack Hopkins Grant 2019)**

Priority 1 - Day 1 Mentorship

| <u>Item</u> | <u>Quantity (a)</u> | <u>Item Subtotal</u> | <u>Notes</u> |
|-------------------------|---------------------|----------------------|---|
| Staffperson (6 month)* | 442 | \$ 5,746 | 6-month training coordinator (outside); 17 hours per week; \$13/hr; extends hours of existing outside staff |
| Staffperson (6 month)** | 156 | \$ 2,028 | 6-month training coordinator (inside); 6 hours per week; \$13/hr; extends hours of existing inside staff |
| TOTAL 1 | | \$ 7,774 | |

Priority 2 - Technology

| <u>Item</u> | <u>Quantity</u> | <u>Item Subtotal</u> | <u>Notes</u> |
|-------------------------|-----------------|----------------------|---|
| PC Desktops | 3 | \$ 2,460 | Dell Inspiron with monitor, keyboard, mouse |
| PC Software | 6 | \$ 594 | Office 365 Business (\$8.25/month in-office computers; six) |
| Printer and Accessories | 1 | \$ 1,262 | Laser printer with six replacement cartridges |
| TOTAL 2 | | \$ 4,316 | |

Priority 3 - Job Support, Connections and Equipment

| <u>Item</u> | <u>Quantity</u> | <u>Item Subtotal</u> | <u>Notes</u> |
|--------------------------|-----------------|----------------------|---|
| Staffperson (6 month)*** | 182 | \$ 2,366 | 6-month job recruiter and interview liaison; 7 hours per week; \$13/hr |
| Work shoes and tools | TBD | \$ 2,000 | Tool kits for job sites; tool belts, hammers, work shoes; incentivized return |
| Lawncare tools | TBD | \$ 1,000 | Ladders, mowers, weed eaters, rakes, snow shovels, etc. Incentivized return |
| TOTAL 3 | | \$ 5,366 | |
| TOTAL REQUESTED | | \$ 17,456 | |
| MATCH | | \$ 19,019 | See below |
| TOTAL PROJ COST | | \$ 36,475 | |

*Builds training workshops, supports life skills groups in office, serve as outside OASIS mentor during start-up

**Builds training workshops, supports life skills groups in jail, serve as inside OASIS mentor during start-up

***Pilot of employment assistance; staffing and materials

(a) Reflect quantify of employee hours or purchased equipment

MATCHING

| <u>Item</u> | <u>Amount</u> | <u>Notes</u> |
|---------------------------------|------------------|--|
| Office Space | \$ 1,800 | 1/4 of the office space of the Transition Support Center |
| Utilities | 437.5/2 | 1/4 of the utilities of the Transition Support Center |
| Fundraising | \$ 225 | 1/4 of the total organizational fundraising expenses |
| TSC Manager (10%) | \$ 850 | 10% of the Transition Support Manager's salary; oversight |
| Accounting & Insurance | \$ 379 | 1/4 of the total organizational expenses |
| Payroll Tax/Fees, Workmans Comp | \$ 217 | Inflated total to reflect effect of addition of new employees |
| Volunteer Labor for Day-1 | \$ 15,548 | Estimate (conservatively) two times more labor by volunteers for Priority 1 than staff |
| TOTAL OF MATCH | \$ 19,019 | |

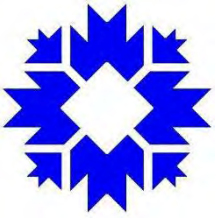
New Leaf New Life

New Leaf- New Life

BALANCE SHEET

As of December 31, 2018

| | TOTAL |
|--|----------------------|
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| 1010 ONB Operating Account | 40,793.84 |
| 1040 ONB Petty Cash | 2,368.77 |
| Total Bank Accounts | \$43,162.61 |
| Other Current Assets | |
| 1015 Cash Reserve | -12,000.00 |
| Total Other Current Assets | \$ -12,000.00 |
| Total Current Assets | \$31,162.61 |
| TOTAL ASSETS | \$31,162.61 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Other Current Liabilities | |
| Payroll Liabilities | |
| Federal Taxes (941/944) | 516.96 |
| IN Income / Local Taxes | 109.57 |
| Total Payroll Liabilities | 626.53 |
| Total Other Current Liabilities | \$626.53 |
| Total Current Liabilities | \$626.53 |
| Total Liabilities | \$626.53 |
| Equity | |
| 3000 Opening Bal Equity | 2,382.51 |
| 3010 Retained Earnings | 3,380.46 |
| Net Income | 24,773.11 |
| Total Equity | \$30,536.08 |
| TOTAL LIABILITIES AND EQUITY | \$31,162.61 |



CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION

AGENCY CONTACT INFORMATION

Lead Agency Name: Bloomington Saint Vincent de Paul Society Serving Monroe County

Address: 1413 E. 17th, Bloomington, IN 47408

Phone: (812) 961-1510

E-Mail: info@bloomingtonsvdp.org

Website: Bloomingtonsvdp.org

President of Board of Directors:

Name of Executive Director:

Phone: Scott Alber, President; 812-322-1093

E-Mail: salber@bloomingtonsvdp.org

Name and Title of Person to Present Proposal to the Committee:

Phone: Ron Kofmehl, Director of Fundraising and Marketing; 812-361-5451

E-Mail: ronkofmehl@comcast.net

Name of Grant Writer:

Phone: Ron Kofmehl

E-Mail: ronkofmehl@comcast.net

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~ 80 |

AGENCY 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.

Mission Statement of the Vehicle Assistance Program:

The Society of St. Vincent de Paul is an all-volunteer organization that serves the poor and unfortunate in Bloomington and Monroe County, Indiana. We are seeking a solution to help move people out of poverty, and safe transportation is one of the key necessities to achieve this. Our Program makes repairs in order to maintain a safe and reliable vehicle necessary for clients and their families.

Clients learn about us from handouts at Township Trustees, Monroe County United Ministries, Salvation Army, 911, church bulletins, and agency direct referrals.

We require no faith-based test; we are open to all.

PROJECT INFORMATION

Project Name: Vehicle Assistance Program

Total cost of project: 100% of funding raised for the program is used for vehicle repairs.

Requested amount of JHSSF funding: \$10,000

Total number of City residents anticipated to be served by this project in 2019: Approximately 25 - 30 households (average household is 4 people).

Total number of clients anticipated to be served by this project in 2019: 35 - 40 households would be helped with funding from this grant.

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Our project involves 2 goals: We are requesting \$10,000 to help clients make repairs in order to maintain a safe and reliable vehicle vital to daily life and needs. Our partner, Joe's Garage, provides quality repairs at a reduced price at 30-50 percent. Effectiveness of the program is measured by the reliability of the repairs made with new parts that insures long term driving reliability.

Our second goal is to complete an assessment of the program for all clients assisted under this grant to measure how and why this is a valuable program with the plan to ultimately establish it as a sustainable program. The assessment will include follow-up interviews with the families to see if the vehicle repairs have maintained the ability to meet their needs.

Our strategy includes surveying clients assisted through this grant funding. Committee members have already identified post-assistance questions to ask our clients. The outcome will be a report from the data gathered. After we measure the effect of this assistance, the report will help us improve our assistance, quantify its impact, identify other partners, and target future funding sources. The report will first be evaluated by the committee, then the entire local St. Vincent de Paul society. We plan to send our representatives to other local organizations to invite them to participate in this program.

Address where project will be housed: 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 to capital improvements to real estate and if you do not own the property at which the project 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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

We are partnering with Joe's Garage, located at 1109 N Jackson St, Bloomington, IN. Joe's Garage enables us to provide help to our clients with quality repairs at a much reduced price.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):* **We have applied to the Psi Iota Xi and will receive \$800 for this project no later than August of 2019. We have submitted a \$10,000 Smithville Charitable Foundation Grant request; however, it is pending. We will not know the result of that application until early June.**

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

We will submit one time per month and will draw down by December 3, 2019.

We are expecting funds in the spring and fall of 2019 with continued support from individual donors, in order to grow this Program.

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 are an all-volunteer organization; there is no paid staff. We have approximately 80 volunteers, some who spend 20-30 hours per week assisting people in need.

Joe's Garage is supportive of our mission of helping individuals who would otherwise be unable to have their vehicles repaired. Joe's Garage provides honest assessment and repair of the vehicle at a much lower cost than dealer or franchised shops enabling the program to help nearly twice the number of families. 100 percent of the grant funding will go to repair of vehicles.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, **will you be able to proceed with partial funding?**
 Yes No

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

| | Item | Cost |
|-----------------|---|-----------------|
| Priority #1 | Vehicle Assistance Program – 30-40 vehicles would be repaired. If funding is less than requested, fewer autos will be able to be repaired. | \$10,000 |
| Priority #2 | 25 – 30 vehicles would be repaired. | \$7,500 |
| Priority #3 | 15 – 20 vehicles would be repaired. | \$5,000 |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Addressing the SCAN document on Transportation:

“Certain policies and guidelines present barriers to providing families needing assistance; these include (the fact that) Township Trustees are prohibited from including the cost of maintaining a car in determining eligibility for income assistance according to state law; this rule prevents some individuals from qualifying.”

We are the only non-profit in Monroe County with an established program for vehicle repair for our local, low-income population. Our vehicle assistance program helps people who need repairs to their automobile. Transportation is one of the key necessities to keep families out of poverty. Many people with low incomes have non-functioning vehicles, yet they do not live or work near a bus route; or, if on a route, the buses do not run late at night or on Sundays when our clients must work. Our goal is to help them make repairs to maintain a safe and reliable vehicle necessary for clients to go to work or find a job, get to a doctor appointment, shop for necessities, or get children to school or daycare.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. *If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.*

SVdP is asking for this grant pursuant to the broad allowance for operational funds this year. In the future, the Vehicle Assistance Program will be funded through donation, grants, and fund raisers. Although we have an annual Hog Roast Fund-Raiser (this June will be our 9th) most of that money is used to pay clients' rent, deposits, med co-pays, and utility bills, not specific programs. We will develop smaller fund-raisers, to be held 2 times per year.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Once their vehicle is repaired, our clients can maintain or seek employment or use their vehicle for transportation to vital services such as health care for themselves and their families. This is an on-going program. The range of repair has been between \$200 - \$400. With \$10,000 in grant funds, we can help approximately 30-40 families during the course of the grant year. Our program is unique in Monroe County. There is no other agency providing this kind of assistance.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

We have developed an assessment to measure how and why this is a valuable program with the plan to see if the vehicle repairs have maintained the ability to meet their needs. Our strategy includes surveying clients helped through this grant. The outcome will be a report from the data gathered. After we measure the effect of this program, the report will help us improve our assistance, quantify its impact, identify other partners, and target future funding sources.

(See Attachment on Assessment of Program)

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.

The Society of St. Vincent de Paul is an all-volunteer organization that serves the poor and unfortunate in Monroe County, Indiana, offering tangible support to those suffering and in need. Our local organization began in 1992, primarily providing donated furniture to families. We meet clients person-to-person, assisting with resource materials, rent and utility bills, rent deposits, furniture and appliances, bed bug suppression, 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 also seek systemic change solutions to help move people out of poverty.

The St. Vincent de Paul Vehicle Assistance Program was initiated in September, 2016 with a generous private contribution of \$4,000 from an anonymous donor. The program was continued with donations totaling \$6,000 and augmented with two vehicle donations netting \$5,975. The specific objective of the program is to offer emergency repairs to vehicles rendered dangerous or inoperable. This unique program offers essential funding to enable families living on the margin to maintain access to vital transportation. During a one-year period (July 1, 2017 through June 30, 2018) we provided vehicle repairs for 81 families totaling \$18,164. Since its inception, the Vehicle Assistance Program has provided 128 individuals with a total of \$28,447 in assistance. Of course, the total cost of those repairs would have been much higher if we had not secured substantial discounts for each repair. Approximately 2/3 or 66% of the funds were used within the city of Bloomington. The rest were within Monroe County.

100% of the grant money will be used for labor and material needed to perform quality repairs. Funding from this grant will allow us to budget for approximately 6 vehicles/month for each of the 6 months of the grant cycle.

Transportation is one of the key necessities for keeping families out of poverty. Without safe, reliable transportation, our clients cannot get to work and therefore may not be able to pay their rent and eventually lose their home. By partnering with Joe's Garage, we enable clients to go to work or find a job, get to a doctor appointment, shop for necessities, or get children to school or daycare. John Evans is the service representative who is willing to assist the client in any way he can, such as help them with his own personal transportation when needed to get them back and forth to the garage before and/or after the repairs are made.

Other programs that are unique to SVdP:

Appliance Program

Bed Bug Suppression Program

Apartment Rental Deposit Program

**The Society of St. Vincent de Paul, Bloomington Council
Balance Sheet
As of September 30, 2018**

| Account | 9/30/2018 Balance |
|---|----------------------|
| Bank Accounts | |
| 0538 Appliance Center | 7,376.09 |
| 0538 Bed Bug Micro Loans | 859.46 |
| 0538 Furniture fund_Hefting Fund | 719.82 |
| 0538 Furniture Ops | 2,225.06 |
| 0538 General Checking | 4,810.65 |
| 0538 Rent Deposits | 148.00 |
| 0538 Sofia Travis Grant | 3,160.06 |
| 0538 Vehicle Assistance Program | 2.20 |
| TOTAL Bank Accounts | 19,301.34 |
| Cash Accounts | |
| Reserved - SlowRelease Hog Roast Profit | 12,915.69 |
| TOTAL Cash Accounts | 12,915.69 |
| Liability Accounts | |
| AG - Angela | 6.06 |
| AM - Andrea | 187.72 |
| BZ - Bob Zerr | 18.56 |
| CH - Chris | 56.14 |
| DM - Dan | 37.51 |
| DS - Dick | 581.98 |
| DV - Donald V | 115.94 |
| DZ - Debbie Zerr | 65.54 |
| GG - Gene | 167.96 |
| JG - Jo | 21.85 |
| JK - Judy | 0.00 |
| JMK-JamesK | -0.09 |
| MC - Carson | 18.72 |
| RK - Ron | -28.96 |
| Rob - Rob Springton | 197.78 |
| TOTAL Liability Accounts | 1,446.71 |
| OVERALL TOTAL | 33,663.74 |

The Liability Accounts section shows the amount each Home Visitor has in his/her "account" (monies from SVdP account) based on an allotted \$80/assigned client; if not all of that money is used by the Home Visitor for that client, it goes forward toward the next client assigned.

Enclosure (1)

SOCIETY OF ST. VINCENT DE PAUL - BLOOMINGTON CONFERENCE

| Operating Fund | | | |
|--------------------------------------|----------------|----|----------------|
| | Actual | | Budgeted |
| | Fiscal Yr 2018 | | Fiscal Yr 2019 |
| INCOME | | | |
| Church Collections | | | |
| St. Charles | \$ 24,423 | \$ | 24,500 |
| St. Paul Catholic Center | 22,195 | | 22,000 |
| St. John the Apostle | 18,495 | | 18,500 |
| St. Thomas Lutheran | 1,375 | | 1,400 |
| Sherwood Oaks | 3,900 | | 3,900 |
| Other | <u>200</u> | | <u>200</u> |
| Subtotal, Churches | \$ 70,588 | \$ | 70,500 |
| Fund Raising: Hog Roast, Other | \$ 17,752 | \$ | 17,000 |
| Donations | \$ 13,655 | \$ | 13,500 |
| Indy Council | \$ 14,400 | \$ | 14,400 |
| SVdP Vehicle Donation Program | <u>-</u> | | <u>-</u> |
| Council Total | \$ 14,400 | \$ | 14,400 |
| | | | |
| Total | \$ 116,395 | \$ | 115,400 |
| EXPENSES | | | |
| Client Financial Assistance | \$ 81,975 | \$ | 79,270 |
| Warehouse and Furniture Operations | | | |
| Rent | \$ 22,200 | \$ | 25,500 |
| Furniture Appliances | - | | - |
| Transportation and other | 1,607 | | 1,600 |
| Utilities, Supplies, Repairs | <u>3,205</u> | | <u>3,200</u> |
| | \$ 27,012 | \$ | 30,300 |
| Op Expenses | | | |
| Computer Services | \$ 2,630 | \$ | 2,630 |
| Other/Dues | 500 | | 500 |
| Office supplies, postage, web, other | <u>2,685</u> | | <u>2,700</u> |
| | \$ 5,815 | \$ | 5,830 |
| Total | \$ 114,802 | \$ | 115,400 |
| Surplus/(Deficit) | \$ 1,593 | \$ | - |

| Cash Accounts | |
|--------------------------------|---------------|
| | 9/30/ 18 Cash |
| | Balances |
| Slow-release Hog Roast Account | \$ 12,918 |
| Appliance Center | 5,007 |
| Bed Bug & Furniture Fund | 3,671 |
| Rent Deposits | 248 |
| Sofie Travis Grant | <u>2,889</u> |
| TOTAL | \$ 24,733 |

Banking Summary - 2018

10/1/2017 through 9/30/2018

| Category | 10/1/2017- 9/30/2018 |
|---------------------------------|-------------------------|
| INCOME | |
| Uncategorized | 100 |
| Church Collections | 200 |
| Sherwood Oaks | 3,900 |
| St Charles | 24,723 |
| St Johns | 18,495 |
| St Pauls | 22,195 |
| St Thomas | 1,375 |
| TOTAL Church Collections | 70,888 |
| Fund Raising | 726 |
| Hog Roast | 17,026 |
| TOTAL Fund Raising | 17,752 |
| Furn Appliances | 23,918 |
| Furniture Operations | |
| Delivery & Pickup | 3,066 |
| Grant | 3,000 |
| Other Donations | 400 |
| Recycle | 2,204 |
| TOTAL Furniture Operations | 8,670 |
| Members Donations | 1,555 |
| Members | 984 |
| TOTAL Members Donations | 2,539 |
| Memorial Donations | 658 |
| Other Donations | 1,461 |
| Fifty + Men Who Care | 8,625 |
| Kroger | 1,783 |
| Special_EOY | 1,228 |
| Vehicle Assistance | 102 |
| TOTAL Other Donations | 13,199 |
| Other Income | 168 |
| Adjustment | 49 |
| TOTAL Other Income | 217 |
| SVDP Indianapolis Council | 14,400 |
| Vehicle Donation | 5,975 |
| TOTAL SVDP Indianapolis Council | 20,375 |
| TOTAL INCOME | 158,315 |

Enclosure (3)

Page 1 of 3

Banking Summary - 2018

10/1/2017 through 9/30/2018

| Category | 10/1/2017- 9/30/2018 |
|--------------------|-------------------------|
| EXPENSES | |
| Uncategorized | 102 |
| Christmas Baskets | 409 |
| Clients | |
| Application Fee | 281 |
| Auto | |
| Fuel | 100 |
| Insurance | 209 |
| Licence | 288 |
| Repairs | 14,869 |
| TOTAL Auto | 15,466 |
| Bed Bugs | 2,093 |
| Child Care | 80 |
| Cleaning Materials | 82 |
| Clothing | 900 |
| Food | 256 |
| Insurance | 80 |
| Legal | 421 |
| Medical | 1,585 |
| Insurance | 252 |
| TOTAL Medical | 1,837 |
| Miscellaneous | 581 |
| Motel | 490 |
| Moving | 1,495 |
| Moving Assistance | 1,534 |
| other Fees | 525 |
| Pest Control | 21 |
| Rent | 30,784 |
| Rent Deposit | 12,017 |
| Repairs | 50 |
| Storage | 1,107 |
| Transportation | 6,114 |
| Utilities | 40 |
| Energy | 27,642 |
| Non-Energy | 3,301 |
| Telephones | 307 |

Banking Summary - 2018

10/1/2017 through 9/30/2018

| Category | 10/1/2017- 9/30/2018 |
|--------------------------|-------------------------|
| TOTAL Utilities | 31,290 |
| TOTAL Clients | 107,505 |
| Contributions | |
| Council Dues | 500 |
| TOTAL Contributions | 500 |
| Furniture Appliances | 11,233 |
| Furniture Op | |
| Other | 4,719 |
| Transportation | 243 |
| Fuel | 2,168 |
| Ins & Reg | 67 |
| R & M | 970 |
| Truck Rental | 394 |
| TOTAL Transportation | 3,842 |
| Warehouse | 286 |
| Computer Services | 2,630 |
| Other | 371 |
| R & M | 99 |
| Rent | 22,200 |
| Utilities | 988 |
| warehouse supplies | 1,050 |
| TOTAL Warehouse | 27,623 |
| TOTAL Furniture Op | 36,184 |
| Moving Assistance | 290 |
| Operating Expenses | 100 |
| Adjustment | 63 |
| Background Checks | 48 |
| Office Supplies | 1,272 |
| Other | 415 |
| Postage | 309 |
| Web Services | 94 |
| TOTAL Operating Expenses | 2,301 |
| TOTAL EXPENSES | 158,524 |
| OVERALL TOTAL | -209 |

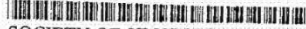


Form NP-1
State Form 51065
(4-03)

Indiana Department of Revenue
Indiana Government Center North Indianapolis, Indiana 46204
Indiana Nonprofit Sales Tax Exemption Certificate
(This certificate may not be used to collect sales tax)

TID: 0127926020
LOC: 000
Corresp ID: 0700044546339
Issued: 05/17/2007

0700044546339



SOCIETY OF ST VINCENT DE PAUL ARCH COUN OF INDIANAPOLIS INC
3001 E 30TH ST
INDIANAPOLIS, IN 46218

Organization is **only exempt** from payment of sales tax on purchases for which the organization is granted exemption.

(Detach Here)

Qualifying for sales tax exemption requires the completion and filing of an application form prescribed by the Indiana Department of Revenue. The taxpayer Identification Number (TID) above must be provided to the retailer if purchases are to be exempt from sales tax. In addition, to qualify for sales tax exemption, such purchases must be used for purposes described in Information Bulletin #10. The TID must be used on Sales Tax Exemption Certificates (ST-105) when making qualified purchases.

The fact that an organization is granted exemption from income tax by the federal government, or that it at one time was granted such an exemption by the State of Indiana, does not necessarily mean that a purchase made by a nonprofit organization is exempt from sales tax.

Requirements for Sales Tax Exempt Purchases by Nonprofit Organizations:

A. Purchases by a Nonprofit Organization for its Own Use:

1. In order to qualify for sales tax exemption on purchases, a nonprofit organization, must satisfy the following conditions:

(a) The organization must be named or described in IC. 6-2.5-5-21(b). Organizations named or described in this Code section are organized and operated exclusively for one or more of the following purposes:

| | | | |
|----------|------------|-------------|-----------|
| Civic | Charitable | Educational | Fraternal |
| Literary | Religious | Scientific | |

(b) Included in the above general organizational categories are the following specifically named types of nonprofit organizations:

| | | |
|--------------------------|-------------------|-----------------------------|
| Business Leagues | Churches | Convents |
| Fraternities | Labor Unions | Licensed Hospitals |
| Monasteries | Parochial Schools | Pension Trusts |
| Shared Hospital Services | Sororities | Student Cooperative Housing |

2. In order to qualify for sales tax exemption, purchases must be used for the same purposes for which the nonprofit organization is granted exemption.

3. *Purchases for the private benefit of any member, director, or officer of the nonprofit organization, or for any other individual are not eligible for exemption. Purchases used for social purposes are never exempt.*

B. Purchases by Nonprofit Organization for Resale:

Purchases of tangible personal property purchased for resale by nonprofit organizations are eligible for sales tax exemption.

Enclosure (4)

Page 1 of 2

SOCIETY OF ST. VINCENT DE PAUL
ARCHDIOCESAN COUNCIL OF INDIANAPOLIS
3001 E. 30TH STREET • INDIANAPOLIS, INDIANA 46218-2850
PHONE: 317-924-5769

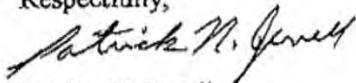
April 17, 2013

To Whom It May Concern:

This is to certify that the St. John the Apostle Conference, Society of St. Vincent dePaul (SSVdP), Bloomington, IN is a 501(c)3 Tax Exempt Organization. The parish SSVdP Conference is an Operating Unit of the SSVdP, Archdiocesan Council of Indianapolis, and as such, has tax exempt status under IRS Group Exemption # 5496, effective July 1, 2009.

If required, substantiating documents can be provided by Mr. Scott Alber, SSVdP Southern Indiana District President at 812-335-1280.

Respectfully,



Patrick N. Jerrell
Archdiocesan Council President

Copy to: Scott Alber



Visit Our Web Site: www.svdpindy.org

Distribution Center: 1201 E. Maryland Street, Indianapolis, IN 46202 • Pmtz-Quitgley Food Center and Corporate Offices: 3001 E. 30th Street, Indianapolis, IN 46218



Bloomington St. Vincent de Paul Society serving Monroe County

Vehicle Assistance Application (Cannot exceed \$200)

Name of Home Visitor: _____ **Assistant Home Visitor:** _____ **Date of Interview:** _____

| | | | |
|---------------------|----------------|-------------------|------------------|
| Full Name of Client | Last | First | Middle Initial |
| Current Address | Street Address | Apt. Complex Name | Apt./Unit Number |
| | City | State | Zip Code |
| Phone Numbers | Home () | Cell () | |
| Email Address | Date of Birth: | | |

Are you presently receiving assistance through Public Housing, Section 8 or neither? Circle correct response.
 Are you presently employed? Yes ___ No ___ If Yes, where? _____
 If you receive benefits, such as Social Security, SSI, SSDI, etc., circle which one and how much \$ _____

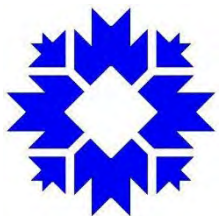
Total monthly income: \$ _____

| Names of individuals living in household: | Relationship: | If person provides income, state amount: | Any Additional information: |
|---|---------------|--|-----------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

Enclosure (5)

Page 1 of 2

| Vehicle Information | |
|---|--------------|
| Type of vehicle: | Year: |
| Do you know what is wrong with your vehicle? Yes ___ No ___ | |
| Is your car drivable to Joe's Garage? Yes ___ No ___ | |
| What is the part needed for your car? _____ | |
| Do you have an estimate from a vehicle repair business? Yes ___ No ___ If yes, what is the estimate? _____ | |
| Can you supply any amount of money toward the cost? \$ _____ None _____ | |
| Questions for survey after 1, 3, 6 months: | |
| Is your vehicle still in use? Yes ___ No ___ | |
| How long has your vehicle been in use after the repair? (measuring length of time of impact) _____ | |
| Family Impact: | |
| How many adults are in your household? _____ Children? _____ | |
| Are there individuals outside your household who depend on the use of your vehicle? _____ If so, how many? _____ | |
| What are the ways this Program helped you (please check all that apply): | |
| <ul style="list-style-type: none"> • Getting to work _____ • Keeping a job _____ • Looking for a job _____ • Getting to doctor appointments _____ • Getting to Indy or nearby towns for appointments _____ • Getting to grocery stores or food pantries _____ • Paying bills with money saved by having my vehicle repaired through SVdP VRP. _____ • Other _____ | |
| If we had not helped you, would you have been able to repair your vehicle? Yes ___ NO ___ | |
| Approximately how long would it have taken you to get your car repaired? _____ | |
| Home Visitor has: | |
| <ul style="list-style-type: none"> • Verified via person to person visit with client and garage vehicle repair person the amount of repair cost: _____ • Told client you cannot agree to pay full price but this amount: \$ _____ | |
| Decision for Vehicle Assistance: _____ Reason: _____ Amount: \$ _____ | |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Shalom Community Center, Inc.

Address: PO Box 451 / 620 S Walnut Street. Bloomington, IN 47402-0451

Phone: 812-334-5734

E-Mail: shalom@shalomcommunitycenter.org

Website: www.shalomcommunitycenter.org

President of Board of Directors: Jane Martin

Name of Executive Director: Forrest Gilmore

Phone: (812) 334-5734, ext. 122

E-Mail: forrest@shalomcommunitycenter.org

Name and Title of Person to Present Proposal to the Committee: As above

Phone:

E-Mail:

Name of Grant Writer: As above

Phone:

E-Mail:

AGENCY INFORMATION

Lead Agency: Shalom Community Center, Inc.

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|----------------|
| 17 | 12 | 1494 (in 2018) |

AGENCY 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.

Shalom Community Center is dedicated to aiding and empowering people experiencing hunger, homelessness, and poverty. Founded in 2000 in response to a growing community concern about the needs of people without homes, Shalom has grown rapidly these past 18 years to become the most comprehensive response to extreme poverty, most notably homelessness, in Monroe County. Shalom provides daytime and overnight shelter, hunger relief, permanent supportive housing, rapid re-housing, social services and case management, employment support, street outreach, eviction prevention, prescription and health care assistance, 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

Project Name: Improving the Basics

Total cost of project: \$12,502

Requested amount of JHSSF funding: \$12,502

Total number of City residents anticipated to be served by this project in 2019: 2,500

Total number of clients anticipated to be served by this project in 2019: 2,500

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Shalom Community Center is requesting \$12,502 for six water-efficient, power-flush toilets, four washers and dryers, and one freezer to continue or improve our emergency and life essential services.

The six workplace toilets will be high efficiency, reducing water use by 20% per flush. In addition, they will provide a power flush. Due to heavy and sometimes inappropriate use of our toilets, plunging emergencies are a daily feature at Shalom. The improved toilets should reduce "plunging events" and hopefully also reduce calls for plumbing support, which will increase access, reduce costs, and be kinder to our staff.

The four commercial-grade Speed Queen washers and dryers will replace the old ones, which have started to falter at such a rate that our repair company suggested replacing them. They will allow Shalom to continue to provide free laundry services, where our guests washed more than 4,300 loads last year.

Lastly, the commercial freezer will replace a freezer in our kitchen that died recently due to replacement parts no longer being available. Freezer capacity is essential to our meals program, which served more than 79,000 meals last year.

Address where project will be housed: 620 S Walnut Street

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 to capital improvements to real estate and if you do not own the property at which the project 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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*): At this time, we do not have other funding aligned for this project.

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds: If awarded the funds we would immediately take steps to purchase and install the equipment. The project will likely be completed with all reimbursements submitted prior to September 1st.

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.

Our staff and volunteers are in constant engagement with our restrooms, washer and dryers, and kitchen. Our annual budget for the operation of our day shelter is \$555,502.33. We have ~1500 volunteers per year.

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|---|-----------------|
| Priority #1 | Six American Standard Cadet Pro Toilets, including installation | \$2,270 |
| Priority #2 | Four Speed Queen Commercial Washers and Dryers, including installation | \$6,632 |
| Priority #3 | One True 27" Single Section Reach-In Freezer, including installation | \$3,600 |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$12,502 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2015-19 Consolidated Plan describes two of its priority needs as providing “funding to non-profit organizations that serve low income individuals/families with their basic emergency needs: food, shelter and health care,” and providing “funding to non-profit organizations that provide a safety net for community members in need.”

The Plan also describes its Anti-Poverty Strategy as providing “access to emergency assistance by providing funding through CDBG and the Jack Hopkins Council Social Service Grant Program to agencies that provide said services.”

On page ninety-six of the Consolidated Plan, it even lists the work of Shalom as an essential part of the City’s service delivery system for people experiencing homelessness. It reads, “In Bloomington, often individuals/families who are homeless or at risk of homelessness learn about valuable services at the Shalom Community Center... The Shalom Community Center is a daytime resource center for people who are living in poverty and experiencing its ultimate expressions: hunger, homelessness, and a lack of access to basic life necessities.”

Because of our central work as a resource center for people experiencing extreme poverty and the essential need for laundry, restrooms, and meals, this project will help address a significant need in our community.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

As a capital expenditure, it would be a one-time expense.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Restrooms, laundry, and meals are life essentials for all of us. As the second largest meal provider for people in poverty in the City, Shalom provided 79,084 meals in 2018. As the primary location for free washers and dryers, guests of the Center were able to clean and dry 4,362 loads of laundry last year. While we have no way to measure the number of people who use our restrooms, we see 200-300 people per day in our Center and approximately 2500 people per year. Shalom has one of the very few public restrooms available to people experiencing hunger, homelessness, and poverty. The toilets will also help us reduce our water usage. Through your funding of these capital expenses, all of these programs will be able to continue into the future.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

For the washers and dryers, we can present you with number of loads of laundry performed over a set period of time of your choosing. For the freezer, we can share the number of meals served. For the toilets, it's more complicated to measure as we don't count people who come through the front door and certainly don't monitor bathroom use. We can report on our water usage and hopefully demonstrate a small change in water use due to the more efficient toilets. We can also report the reduction (hopefully) in the number of plunging events, which currently average ~1 per day. (Yes, I do hope this gives you a little giggle).

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.

Program Budget 2019

| | |
|----------|--|
| \$2,270 | Purchase and installation of six toilets (Mann Plumbin) |
| \$6,632 | Purchase and installation of four washer/dryers (Morrison's) |
| \$3,600 | Purchase and delivery of one freezer (Gooldy's & Son's) |
| \$12,502 | TOTAL JACK HOPKINS GRANT REQUEST |

Further details are in attached estimates from Mann Plumbing, Morrison Appliances, and Gooldy & Son's.

The Gooldy's and Son's estimate is difficult to read. The price of the freezer goes from \$3,200 to \$3,400 as of April 1st, so we included \$3,400 in our estimate. The freezer is from True Manufacturing, model #T-23F-HC.

Proposal

Shalom Community Center

GOOLDY & SONS, INC.

926 West 17th Street
BLOOMINGTON, INDIANA 47404
(812) 332-1682
FAX (812) 332-2610

1113

| | | |
|--|--------------------------------------|--------------------------|
| PROPOSAL SUBMITTED TO <i>Shalom Ctr</i> | PHONE <i>(812) 318-6811</i> | DATE <i>3-20-2019</i> |
| STREET | JOB NAME <i>Att. Rm</i> | |
| CITY, STATE and ZIP CODE | JOB LOCATION <i>Room 330-1184</i> | |
| ARCHITECT | DATE OF PLANS | JOB PHONE |

We hereby submit specifications and estimates for:

* Estimate for new High low P.I. Frames per night

Unit # T-22 P-100 Twenty High low
P.I. Frames of each unit = 3,200.00
(price includes freight & shipping)
(tax excl)

Unit: Estimate labor to be installed in place = 150.00 - 700.00
Estimate Total = 3,350.00 - 3,900.00

* Lead time = 7-2 days
(Note: Unit will increase in price as of 4-1-2019 to 3,400 units @ one price increase)

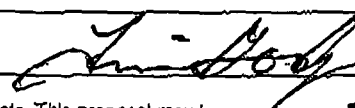
We propose hereby to furnish material and labor --- complete in accordance with above specifications, for the sum of

Payment to be made as follows:

Net 30 days

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



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.

Signature _____

Date of Acceptance: _____

Signature _____

Shalom Community Center
620 S. Walnut St. Bloomington, IN 47401

3-20-19

Est to remove old toilet and install new Am. Std #215CA.104 1.28 gal per flush elongated white toilet with seat. Hook up to water supply and check for leaks.

Total Labor, Toilet and misc supplies. \$378.030 Per toilet.

Jeff McKamey



PLEASE REMIT TO: 812-332-7694

MORRISON TV & APPLIANCES
900 W KIRKWOOD AVE

Shalom Community Center

BLOOMINGTON, IN 47404

E S T I M A T E

| INVOICE NUMBER | ACCOUNT NUMBER | SALES # | DEPT. # | LOCATION |
|----------------|----------------|---------|---------|----------|
| 9000000481 | 3345734 | MS | APP | W |

SOLD TO:

SHIP TO:

SHALOM CENTER
620 S WALNUT

BLOOMINGTON

IN 47401

| INVOICE DATE | PO NUMBER | TERMS | PAY METHOD |
|------------------|-----------|--------|------------|
| 03/18/2019 16:18 | | NET 30 | ESTIMATE |

| QTY | MAKE | PRODUCT | DESCRIPTION | PRICE | EXTENSION |
|-----|-----------|--------------------|----------------|--------|-----------|
| 4 | SER # | PENDING ASSIGNMENT | WASHER | 859.00 | 3436.00 |
| | MAKE: SPE | MODEL# | AWN43RSN | | |
| 4 | SER # | PENDING ASSIGNMENT | ELECTRIC DRYER | 799.00 | 3196.00 |
| | MAKE: SPE | MODEL# | ADE3SRG | | |

Dan Stewart
3-19-19

NO CHARGE FOR DELIVERY OR HOOK UP TO EXISTING CONNECTIONS

| SUB TOTAL | TAX | DELIVERY | DISCOUNT | TOTAL |
|-----------|-----|----------|----------|---------|
| 6632.00 | | | | 6632.00 |

CUSTOMER SIGNATURE _____

C O P Y

REFUNDS OR EXCHANGE WITHIN 90 DAYS WITH THIS RECIEPT. RE-STOCKING FEE OF 20% ON ITEMS OVER 30 DAYS. INVOICES THAT ARE NOT PAID AFTER 60 DAYS ARE SUBJECT TO FINANCE CHARGES AND/OR COLLECTIONS. NO RETURNS ON ELECTRICAL PARTS AND NO RETURNS ON INSTALLED PARTS. ALL SALES FINAL. ITEMS LEFT UNCLAIMED OVER 60 DAYS BECOME PROPERTY OF MORRISON APPLIANCES

Balance Sheet
As of December 31, 2018
Dec 31, 18

| | |
|---|-----------------------------------|
| ASSETS | |
| Current Assets | |
| Checking/Savings | |
| B1000 · B1000 Old National Checking | 352,805 25 |
| B1002 · B1002 Capital Reserve | 31,980 73 |
| B1003 · B1003 Friends Place Account | 611 80 |
| B1005 · B1005 Cash Reserves Account | -15 16 |
| Total Checking/Savings | <u>385,382 62</u> |
| Accounts Receivable | |
| B1010 · B1010 A/R Grants | -271 00 |
| B1012 · B1012 A/R Unrestricted Donation | -221 65 |
| Total Accounts Receivable | <u>-492 65</u> |
| Other Current Assets | |
| 12000 · Undeposited Funds | 371 00 |
| B1210 · Friend's Place CD | 197,048 69 |
| Total Other Current Assets | <u>197,419 69</u> |
| Total Current Assets | <u>582,309 66</u> |
| Fixed Assets | |
| B1018 · B1018 Land | 140,980 88 |
| B1020 · B1020 Buildings | 177,879 12 |
| B1022 · B1022 Furniture and Fixtures | 27,447 11 |
| B1024 · B1024 Furniture and Fixtures FP | 19,590 34 |
| B1026 · B1026 Equipment FP | 1,199 00 |
| B1028 · B1028 Equipment | 66,666 97 |
| B1040 · B1040 Accumulated Depreciation | -190,729 99 |
| B1044 · B1044 Building Improvements | 290,473 16 |
| B1046 · B1046 Land Improvements | 6,899 00 |
| Total Fixed Assets | <u>540,405 59</u> |
| TOTAL ASSETS | <u><u>1,122,715.25</u></u> |
| LIABILITIES & EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Accounts Payable | |
| B2042 · B2042 Payables | -1,639 07 |
| Total Accounts Payable | <u>-1,639 07</u> |
| Other Current Liabilities | |
| B2030 · B2030 Deductions Payable | 346 22 |
| B2036 · B2036 Flex Med Spending Ded | 1,603 65 |
| B2038 · B2038 Empl United Way Payable | 555 01 |
| B2044 · B2044 Garnishment | -86 22 |
| Total Other Current Liabilities | <u>2,418 66</u> |
| Total Current Liabilities | <u>779 59</u> |
| Long Term Liabilities | |
| B2040 · B2040 Note Payable - Building | 1,009 32 |
| Total Long Term Liabilities | <u>1,009 32</u> |
| Total Liabilities | <u>1,788 91</u> |
| Equity | |
| 30000 · Opening Balance Equity | 657,395 44 |
| 32000 · Retained Earnings | 413,616 67 |
| Net Income | 49,914 23 |
| Total Equity | <u>1,120,926 34</u> |
| TOTAL LIABILITIES & EQUITY | <u><u>1,122,715.25</u></u> |

Shalom Community Center
Statement of Financial Income and Expense
Shalom Community Center

| | <u>Jan - Dec 18</u> |
|--|---------------------|
| Income | |
| C4000 C4000 - Income Used for Capital | 51,840 33 |
| D0000 · D0000 Designated Income | |
| D4020 · D4020 Indiv Designated Gif | 2,700 00 |
| D4030 · D4030 Designated Fund Grants | 16,189 22 |
| Total D0000 · D0000 Designated Income | <u>18,889 22</u> |
| F0000 · F0000 Friends Place Income | |
| F1000 · F1000 Friend's Place Income | 66,915 50 |
| F1100 Friend's Place Interest Income | 53 97 |
| Total F0000 · F0000 Friends Place Income | <u>66,969 47</u> |
| G0000 · Grant Income | |
| G0001 · 14.267 HUD Supportive Housing | |
| G1025 · Crawford 18 IN0147L5H021602 | |
| G1030 · Crawford Occupancy Fees 2018 | 10,545 00 |
| G1035 · Crawford Non-HUD 2018 | |
| G1038 · Small & Simple Grant | 500 00 |
| G1035 Crawford Non-HUD 2018 - Other | 2 941 51 |
| Total G1035 Crawford Non-HUD 2018 | <u>3 441 51</u> |
| G1025 Crawford 18 IN0147L5H021602 - Other | 216,283 36 |
| Total G1025 · Crawford 18 IN0147L5H021602 | <u>230,269 87</u> |
| G1026 · Crawford 19 IN0147L5H021703 | |
| G1031 · Crawford Occupancy Fees 2019 | 12,528 50 |
| G1032 · Crawford Non-HUD 2019 | 6,501 95 |
| G1026 Crawford 19 IN0147L5H021703 - Other | 182,871 53 |
| Total G1026 · Crawford 19 IN0147L5H021703 | <u>201 901 98</u> |
| G2026 · Johnson 18 IN0181L5H021500 | |
| G2027 · Johnson Occupancy Fees 2018 | 8,861 00 |
| G2028 · Johnson Non-HUD Grants 2018 | |
| G2029 · Jack Hopkins - for Johnson 2018 | 8,915 00 |
| Total G2028 · Johnson Non-HUD Grants 2018 | <u>8,915 00</u> |
| G2026 · Johnson 18 IN0181L5H021500 - Other | 283,172 83 |
| Total G2026 · Johnson 18 IN0181L5H021500 | <u>300 948 83</u> |
| G2126 Johnson 19 IN0181L5H021701 | |
| G2127 · Johnson Occupancy Fees 2019 | 2,507 00 |
| G2128 Johnson Non-HUD Grants 2019 | 100 00 |
| G2126 · Johnson 19 IN0181L5H021701 - Other | 102,133 25 |
| Total G2126 · Johnson 19 IN0181L5H021701 | <u>104,740 25</u> |
| G2300 · Coord Entry IN0194L5H021600 | 2,789 25 |
| Total G0001 14.267 HUD Supportive Housing | <u>840,650 18</u> |
| G0002 · 14.231 IHEDA Grants | |
| G1010 · IHEDA ESG-Shelter | 62,237 34 |
| G1015 · Rapid Rehousing | |
| G1018 · Rapid Rehousing - Foundation | 50,000 00 |
| G1015 · Rapid Rehousing - Other | 248,827 16 |
| Total G1015 · Rapid Rehousing | <u>298,827 16</u> |
| G1020 · IHEDA ESG - Outreach | |
| G1021 · COB Outreach | 40,479 87 |
| G1020 · IHEDA ESG - Outreach - Other | 27,678 50 |
| Total G1020 · IHEDA ESG - Outreach | <u>68,158 37</u> |
| Total G0002 · 14.231 IHEDA Grants | <u>429,222 87</u> |
| G0005 · 93.558 TANF | |
| G1017 · TANF Income | 39,686 48 |
| Total G0005 · 93.558 TANF | <u>39,686 48</u> |
| G1050 · Various Small Grants | 15,777 40 |
| G1060 · LocalMotion Grant | 1,500 00 |
| Total G0000 Grant Income | <u>1,326,836 93</u> |
| K4000 · In-kind Income | 30,344 21 |

Statement of Financial Income and Expense

Shalom Community Center

| | <u>Jan - Dec 18</u> |
|---|---------------------|
| O0000 · Operating Income | |
| O4000 · Individual - for Operations | 235,187 37 |
| O4005 · Faith Comm for Operations | 19 923 40 |
| O4010 · Businesses for Operations | 37 785 81 |
| O4035 · Organizations for Opns | 55 780 38 |
| O4055 · NAP Contributions | 20,275 00 |
| O4065 · Other Operating Income | 15 17 |
| O4070 Weekend Program Fee | 5,706 46 |
| O4080 · Hunger Relief | 23,274 15 |
| Total O0000 Operating Income | <u>397,947 74</u> |
| S0000 · Weekend Operations Income | <u>89,000 00</u> |
| Total Income | <u>1,981,827 90</u> |
| Gross Profit | 1,981 827 90 |
| Expense | |
| 66900 · Reconciliation Discrepancies | -0 01 |
| D6400 · Guest Needs Designated | |
| D6410 · D6410 Guest Needs Other Desig | 149 30 |
| D6420 · D6420 Guest BMV/B C. Fees | 3,790 10 |
| D6430 · D6430 Guest Needs - HIP Payment | 1,629 08 |
| D6450 · D6450 Out of Town Bus Tickets | 6,876 00 |
| D6460 · D6460 Guest Needs -Pharmacy | 1,347 71 |
| D6470 D6470 Client Utilities and Rent | 11,152 41 |
| D6480 · Local Bus Tickets | 600 00 |
| Total D6400 · Guest Needs Designated | <u>25 544 60</u> |
| F6000 · F6000 Friends Place Expenses | |
| F6100 · Salaries/Wages Friend | 129,205 38 |
| F6105 · Payroll Taxes Friend | 10,611 81 |
| F6106 · WC & HC Friend | 9,572 93 |
| F6210 · Office Supplies | 222 69 |
| F6220 · Fundraising Expense | 5,268 48 |
| F6235 · Computer Equipment | 87 00 |
| F6245 · Telephone | 1 283 35 |
| F6250 Internet Service | 555 47 |
| F6260 Miscellaneous Expense | 204 52 |
| F6305 · Custodial Supplies | 1 343 13 |
| F6310 · Waste Removal | 418 08 |
| F6319 · Fire Suppression | 1,030 05 |
| F6320 Maintenance and Repair | 914 16 |
| F6321 · Pest Control | 3,624 00 |
| F6325 · Kitchen Supplies | 14 98 |
| F6335 · Electricity | 5,870 44 |
| F6340 · Natural Gas | 2,832 00 |
| F6345 · Water Expense | 1,555 03 |
| F6450 · Guest Needs | 213 00 |
| Total F6000 · F6000 Friends Place Expenses | <u>174,826 50</u> |
| G6000 · Grant Expenditures | |
| G6001 14.267 HUD Supportive Housing | |
| G6025 · Crawford 2017 IN0147L5H021501 | |
| G6043 · Crawford 17 Non-Salary Expenses | 37 35 |
| G6051 · Crawford 17 Occupancy Fees Exp | |
| G6390 · Crawford 2017 OF Staff Reimb | 311 94 |
| G6391 · Crawford 2017 OF Welcome Kits | 664 19 |
| G6395 · Crawford 2017 OF Other Exp | 46 38 |
| G6051 · Crawford 17 Occupancy Fees Exp - Other | 346 89 |
| Total G6051 Crawford 17 Occupancy Fees Exp | <u>1,369 40</u> |

Shalom Community Center
Statement of Financial Income and Expense

Shalom Community Center

| | <u>Jan - Dec 18</u> |
|---|--------------------------|
| G6292 · Crawford Non-HUD 2017 | |
| G6298 · Boston Scientific Expenses | 3,512 09 |
| G6292 · Crawford Non-HUD 2017 - Other | 150 00 |
| Total G6292 · Crawford Non-HUD 2017 | <u>3,662 09</u> |
| Total G6025 · Crawford 2017 IN0147L5H021501 | 5,068 84 |
| G6225 · Crawford 2018 IN0147L5H021601 | |
| G6250 · Salary/Wage Crawford 2018 | 32 584 78 |
| G6255 · Payroll Tax Crawford 2018 | 2,848 38 |
| G6260 · Other Admin Exp Crawford 2018 | 951 40 |
| G6288 · Non-Salary Crawford 2018 | 117 683 43 |
| G6301 · Crawford 18 Occupancy Fees Exp | |
| G6302 · Crawford 2018 OF Staff Reimb | 99 94 |
| G6304 · Crawford 2018 OF Cleaning | 160 00 |
| G6305 · Crawford 18 OF Other Exp | 5,011 17 |
| G6301 · Crawford 18 Occupancy Fees Exp - Other | 4,824 10 |
| Total G6301 · Crawford 18 Occupancy Fees Exp | <u>10 095 21</u> |
| G6225 · Crawford 2018 IN0147L5H021601 - Other | 82 91 |
| Total G6225 · Crawford 2018 IN0147L5H021601 | <u>164,246 11</u> |
| G6271 · Crawford Non-HUD 2018 | |
| G6297 · Small & Simple Grant Exp 2018 | 500 00 |
| G6271 · Crawford Non-HUD 2018 - Other | 150 00 |
| Total G6271 · Crawford Non-HUD 2018 | <u>650 00</u> |
| G6275 · Johnson 2018 IN0181L5H021500 | |
| G6170 · Salary/Wage Johnson 2018 | 53,376 79 |
| G6175 · Payroll Tax Johnson 2018 | 4 470 94 |
| G6180 · Johnson 2018 Non-Salary | 255,046 37 |
| G6185 · Johnson 18 Occupancy Fees Exp | 5 691 19 |
| G6190 · Johnson Non-HUD 2017-2018 | |
| G6192 · Jack Hopkins for Johnson 2018 | 8 915 65 |
| G6190 · Johnson Non-HUD 2017-2018 - Other | 2,190 32 |
| Total G6190 · Johnson Non-HUD 2017-2018 | <u>11,105 97</u> |
| Total G6275 · Johnson 2018 IN0181L5H021500 | <u>329,691 26</u> |
| G6276 · Johnson 2019 IN0181L5H021701 | |
| G6171 · Salary Wage Johnson 2019 | 19,453 93 |
| G6176 · Payroll Tax Johnson 2019 | 1 519 33 |
| G6181 · Johnson 2019 Non Salary | 79,158 17 |
| G6186 · Johnson 19 Occupancy Fees Exp | |
| G6187 · Johnson 19 OF Staff Reimburse | 75 00 |
| G6189 · Johnson 2019 OF Other Expenses | 2,133 51 |
| Total G6186 · Johnson 19 Occupancy Fees Exp | <u>2,208 51</u> |
| G6191 · Johnson Non-HUD 2018-2019 | 600 00 |
| Total G6276 · Johnson 2019 IN0181L5H021701 | <u>102,939 94</u> |
| G6401 · Coordinated Entry | |
| G6402 · Coordinated Entry Payroll | 5,910 23 |
| G6403 · Coordinated Entry Payroll Tax | 462 47 |
| Total G6401 · Coordinated Entry | <u>6,372 70</u> |
| G6826 · Crawford 2019 IN0147L5H020703 | |
| G6810 · Salaries & Wages Crawford 2019 | 45,729 53 |
| G6811 · Payroll Taxes Crawford 19 | 3,585 29 |
| G6812 · Crawford Non-HUD 2019 Exp | 375 00 |
| G6827 · Non-Salary Expenses Crawford 19 | 163,545 59 |
| G6828 · Crawford 19 Occupancy Fees Exp | |
| G6829 · Crawford 2019 OF Staff Reimb | 93 51 |
| G6830 · Crawford 2019 OF Cleaning | 4,600 00 |
| G6831 · Crawford 2019 OF Other Exp | 3,398 74 |
| G6826 · Crawford 19 Occupancy Fees Exp - Other | 3,214 33 |
| Total G6826 · Crawford 19 Occupancy Fees Exp | <u>11,306 65</u> |
| Total G6826 · Crawford 2019 IN0147L5H020703 | <u>224,542 04</u> |
| Total G6001 · 14 267 HUD Supportive Housing | <u>833,510 89</u> |

Shalom Community Center
Statement of Financial Income and Expense
Shalom Community Center

| | <u>Jan - Dec 18</u> |
|--|---------------------|
| G6002 · 14.231 IHCD Grants | |
| G6100 · G6100 ESG Shelter | |
| G6110 · G6110 Salary/Wage ESG Shelter | 50,420 50 |
| G6115 · G6115 Payroll Tax ESG Shelter | 4 377 56 |
| G6280 · G6280 Non-Salary ESG Shelter | 17 469 23 |
| Total G6100 · G6100 ESG Shelter | <u>72,267 29</u> |
| G6200 · G6200 - ESG Outreach | |
| G6120 · G6120 Salary/Wage ESG Outreach | 36,607 60 |
| G6125 · G6125 Payroll Tax ESG Outreach | 2 987 27 |
| G6282 · G6282 Non-Salary ESG Outreach | 9,386 35 |
| Total G6200 · G6200 - ESG Outreach | <u>48,981 22</u> |
| G6300 · G6300 ESG Rapid Rehousing | |
| G6130 · G6130 Wages Rapid Rehousing | 56 660 51 |
| G6135 · G6135 Payroll Tax Rapid Re | 5,097 52 |
| G6283 · G6284 Non-Salary Rapid Rehous | |
| G6380 G6380 RR Rental Assistance | 116,958 92 |
| G6381 · G6381 RR Financial Assistance | 45 140 55 |
| G6283 · G6284 Non-Salary Rapid Rehous - Other | 1 101 63 |
| Total G6283 · G6284 Non-Salary Rapid Rehous | <u>163 201 10</u> |
| G6351 · Rapid Rehousing Foundation Gr | |
| G6352 · Salaries Wages RR Foundation | 8 540 24 |
| G6353 · Payroll Taxes RR Foundation | 667 49 |
| G6354 · Non-Salary Expense RR Foundatio | 4,974 93 |
| Total G6351 · Rapid Rehousing Foundation Gr | <u>14,182 66</u> |
| G6361 · Rapid Rehousing Facebook Donati | |
| G6362 Non-Salary Exp Facebook | 384 49 |
| Total G6361 · Rapid Rehousing Facebook Donati | <u>384 49</u> |
| Total G6300 · G6300 ESG Rapid Rehousing | <u>239,526 28</u> |
| Total G6002 14.231 IHCD Grants | <u>360 774 79</u> |
| G6003 · 14.267 Point-in-Time Count | 1 215 00 |
| G6005 · 93.558 TANF | |
| G6400 · G6400 TANF Expenditures | |
| G6140 · Salaries/Wages TANF-ADMIN | 232 32 |
| G6145 · G6145 Payroll Tax TANF-ADMIN | 19 37 |
| G6286 · G6286 Non-Salary TANF | |
| G6382 G6382 Non Salary TANF-Rental | 18,953 94 |
| G6383 · G6383 Non Salary TANF Fin. Asst | 16,703 21 |
| Total G6286 · G6286 Non-Salary TANF | <u>35,657 15</u> |
| Total G6400 · G6400 TANF Expenditures | <u>35,908 84</u> |
| Total G6005 · 93.558 TANF | <u>35,908 84</u> |
| G6006 · Bike Rack Enclosure | 750 00 |
| G6199 · Healthcare & WC-Grants | 22,541 26 |
| G6600 · G6600 Various Small Grant | |
| G6160 · G6160 Salary/Wage Var Small Gr | 632 19 |
| G6165 · G6165 Payroll Tax Var Small Gr | 50 76 |
| G6294 · G6294 Non-Salary Var Small Gr | 5,652 22 |
| Total G6600 · G6600 Various Small Grant | <u>6,335 17</u> |
| Total G6000 · Grant Expenditures | <u>1,261,035 95</u> |

Statement of Financial Income and Expense

Shalom Community Center

Jan - Dec 18

| | |
|--|--------------------------------|
| O6000 · Operating Expenses | |
| O6110 · Salary/Wage SCC | 182,636 75 |
| O6115 Payroll Tax - SCC | 14,386 61 |
| O6120 Workers Comp Ins | 1,985 51 |
| O6130 · Employee Health Benefits | 11 511 19 |
| O6140 · Subcont Work Study | 1,379 40 |
| O6200 · Office Supplies | 2,204 39 |
| O6201 · Internet Service | 2,050 88 |
| O6202 · Telephone | 1,862 21 |
| O6203 · Postage | 3,447 75 |
| O6204 · Insurance | 10,456 00 |
| O6205 · Computer Equipment | 125 00 |
| O6208 · Communications Expense | 516 95 |
| O6210 · Background Checks | 190 30 |
| O6212 · Employee Expense | 586 45 |
| O6220 · Equipment Lease | 5,303 93 |
| O6224 Payroll Accounting Fees | 2 683 53 |
| O6226 · Professional Fees | 8 422 22 |
| O6228 · Dues & Subscriptions | 286 26 |
| O6230 · Education/Seminars | 4 812 34 |
| O6232 · Bank/Credit Card Fees | 2,114 18 |
| O6234 · Fundraising Expense | 17,146 64 |
| O6236 Subcontractor - General | 101 12 |
| O6298 Miscellaneous Expense | 41,522 91 |
| O6299 · Interest Expense | 311 95 |
| O6310 · Custodial Supplies | 8,336 50 |
| O6315 · Kitchen Supplies | 5,368 53 |
| O6320 · Maintenance and Repair | 10,975 30 |
| O6340 Waste Removal | 2 734 91 |
| O6345 · Snow Removal | 110 00 |
| O6350 · Electricity | 4,941 94 |
| O6355 · Natural Gas | 1,261 16 |
| O6360 Water Expense | 6 201 98 |
| O6410 Food Expense | 43,212 14 |
| O6415 · Guest Needs - Operating | 309 58 |
| O6425 · Client Bus Tickets | 3,000 00 |
| O6000 · Operating Expenses - Other | 5,239 00 |
| Total O6000 · Operating Expenses | <u>407,735 51</u> |
| S6000 · Weekend Operations Expenses | |
| S6110 · Salary/Wage -Sat & Sun | 40,232 27 |
| S6115 · Payroll Tax Sat & Sun | 2,742 60 |
| S6125 · Workers Comp | 437 38 |
| S6220 · Supplies Sat & Sun | 208 04 |
| S6410 · Food and Kitchen Supplies - Sat | 13,342 37 |
| S6490 · Miscellaneous Sat & Sun | 5,808 46 |
| Total S6000 · Weekend Operations Expenses | <u>62,771 12</u> |
| Total Expense | <u>1,931,913 67</u> |
| Net Income | <u><u>49,914.23</u></u> |

AGENCY CONTACT INFORMATION

Lead Agency Name: South Central Indiana Housing Opportunities (SCIHO)

Address: 1007 N. Summit St., Bloomington, IN 47404

Phone: 812-335-2200

E-Mail: dmyerson@sciho.org

Website: sciho.org

President of Board of Directors: John Vargo

Name of Executive Director: Deborah Myerson

Phone: 812-993-0898

E-Mail: dmyerson@sciho.org

Name and Title of Person to Present Proposal to the Committee:

Deborah Myerson, Executive Director

Phone: 812-993-0898

E-Mail: dmyerson@sciho.org

Name of Grant Writer: Deborah Myerson

Phone: 812-993-0898

E-Mail: dmyerson@sciho.org

AGENCY INFORMATION

Lead Agency: South Central Indiana Housing Opportunities

Is Lead Agency a 501(c)(3)? [X] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees: 1

Full time: 1

Part Time: 1

Volunteers: 23

AGENCY MISSION STATEMENT (150 words or less)

South Central Indiana Housing Opportunities is dedicated to expanding housing options for low- and moderate-income households in Bloomington, Monroe County, and Brown, Greene, Lawrence, Owen, and Morgan Counties in South Central Indiana. Our vision is to build sustainable and inclusive communities that offer diverse housing options for people of all income levels, ages, and abilities.

PROJECT INFORMATION

Project Name: Executive Director Salary (Bridge)

Total cost of project: \$39,100

Requested amount of JHSSF funding: \$19,550

Total number of City residents anticipated to be served by this project in 2019:

Our current programs focus on supporting safe and stable housing for low- and moderate-income renters in our service area. Data on SCIHO's current program recipients indicates that 80% are Bloomington residents. Using this calculation, we expect to serve 5,278 city residents in 2019.

Total number of clients anticipated to be served by this project in 2019:

We estimate SCIHO programs in 2019 will reach 6,597 people, including Switchyard Apartments, the Housing4Hoosiers website, tenant/landlord education series, tenant/landlord outreach, Tenant Assistance Table, and Housing Navigators technical assistance.

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

SCIHO is requesting \$19,550 from the Jack Hopkins Social Services Funding Committee to serve as bridge funding for the salary of the Executive Director while we complete the construction of Phase 1 of Switchyard Apartments, a multifamily building of all affordable apartments next to the City's new Switchyard Park. The Switchyard Apartment budget includes a developer fee that is an important source of revenue for us. However, SCIHO can only request disbursement of these funds based on the verified to-date completion of construction. The

current construction timeline is May 2019 - January 2020. Bridge funding from the JHSSF grant for the Executive Director's salary will provide key interim support to sustain and grow SCIHO's housing programs for low- and moderate-income Bloomington residents and leverage other operational funds.

Address where project will be housed:

1007 N Summit St, Bloomington, Indiana – SCIHO office

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 to capital improvements to real estate and if you do not own the property at which the project 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.*

Not applicable

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.

Not applicable.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (Please indicate source, amount, and whether confirmed or pending):

| Source | Amount | Status |
|--|----------|-----------|
| Developer fee - Switchyard Apartments, Phase 1 | \$15,000 | Confirmed |
| 2019 Neighborhood Assistance Program (NAP) Tax credits | \$3,550 | Pending |

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete drawdown of funds:

SCIHO will submit three monthly invoices in the third quarter of 2019. This schedule reflects applicable personnel expenses and provides an essential bridge to an expected gap in organizational revenues that can pay for our operational expenses.

| Invoice | Submission Date |
|------------------------|-----------------|
| #1: July expenses | August 5, 2019 |
| #2: August expenses | Sept. 2, 2019 |
| #3: September expenses | Oct. 7, 2019 |

BUDGET

| PROJECT SOURCES | AMOUNT |
|--|-----------------|
| Developer fee - Switchyard Apartments, Phase 1 | \$15,000 |
| 2019 Neighborhood Assistance Program (NAP) Tax credits | \$3,550 |
| 2019 JHSSF Grant | \$19,550 |
| TOTAL | \$39,100 |
| PROJECT USES | AMOUNT |
| Executive Director Full-time Salary (26 weeks) | \$39,100 |
| TOTAL | \$39,100 |
| TOTAL REQUESTED | \$19,550 |

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

- **Sept. 2019:** Portion of the developer fee. SCIHO can only request disbursement of the developer fee for Phase 1 of Switchyard Apartments based on the verified to-date completion of construction. (Overall construction timeline is May 2019 - January 2020.)
- **December 2019:** NAP Tax credits fully sold by the end of the calendar year, based on our experience in our first two years.

FISCAL LEVERAGING (100 words or less)

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

The bridge funding from the JHSSF grant for the Executive Director's salary will provide key stability to sustain and grow SCIHO's program areas and accordingly, leverage other operational funds. Current and upcoming programs include:

- **Phase 2 of the Switchyard Apartments project:** assembling the financing to launch this next stage of the project.
- **Add to our affordable housing pipeline:** scout out new prospects for new construction or rehabilitation.
- **Housing 4Hoosiers Program:** improve the website, distribute the "Renting in Indiana" handbook, organize the semi-annual Tenant/Landlord Education Series
- **Housing Navigators program:** train community volunteers to provide renters with housing guidance and improve their housing stability
- **Tenant Assistance Table:** participate in a new collaborative eviction-avoidance program at the Monroe County Justice Building
- **Plan for an inaugural annual fundraising event**

FUNDING PRIORITIES -- RANKED

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

[x] Yes [] No

NOTE: Without full funding of this request, we expect to reduce the Executive Director’s hours. The options below reflect these variations.

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

| | Item | Cost |
|------------------------|--|-----------------|
| Priority #1 | 13 weeks of Executive Director @ full-time salary | \$19,550 |
| Priority #2 | 13 weeks of Executive Director @ ¾ time salary | \$14,662 |
| Priority #3 | 13 weeks of Executive Director @ half-time salary | \$9,775 |
| TOTAL REQUESTED | 13 weeks of Executive Director @ full-time salary | \$19,550 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

SCIHO’s mission-based programs are designed to support housing needs for low- and moderate-income households and address a widely recognized housing crisis in Bloomington.

| RISING COST OF HOUSING FOR RENTERS IN THE CITY OF BLOOMINGTON | | |
|---|----------------------------------|--|
| | 2007-2011 | 2011-2015 |
| Cost-Burdened Households: >30% of income spent on housing | 39% | 61% |
| Extremely Cost-Burdened Households: >50% of income spent on housing | 29% | 42% |
| Source | HAND 2015-2019 Consolidated Plan | U.S. Housing and Urban Development Comprehensive |

| | | |
|--|--|---|
| | | Housing Affordability Strategy data |
|--|--|---|

In the City of Bloomington, 83% of renter households are low-income (16,815 out of 20,030), and 36% of homeowners are low-income (3,635 out of 10,200). (Source: *U.S. Housing and Urban Development [Comprehensive Housing Affordability Strategy](#) data, 2011-2015*)

According to the Service Community Assessment of Needs (SCAN) for Monroe County, Indiana, 13% of homeowners surveyed in 2010 indicated a major problem having enough money to pay their rent or mortgage.

The shortage of affordable housing in the City of Bloomington is also well-documented in sources such as the City’s Comprehensive Master Plan adopted in 2018, and reflected in the affordable housing incentives in the current revision of the Unified Development Ordinance.

The Consolidated Plan’s *Strategy 5: Public Service Assistance* (p.3) calls for funding to non-profit organizations that provide a safety net for community members in need, as well as funding valuable services to improve quality of life.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

SCIHO is pleased to be developing Switchyard Apartments as a means to increase the city’s stock of permanently affordable housing supply. However, the timeline for the financing and construction of Phase 1 has taken several months longer than originally projected. (*See details under the “Other Comments” section, below)

Especially as a newer local nonprofit, we do not have reserves to draw on for operations when the expected income from the project required additional time. The bridge funding from the JHSSF grant will help us manage a crucial gap in our revenues during the construction period for Phase 1 of Switchyard Apartments.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Bloomington’s high quality of life makes it an attractive, desirable place to live. Yet, these same qualities also have contributed to a high-cost housing market where low-and moderate-income households increasingly find it difficult to have safe and stable housing that is also affordable.

South Central Indiana Housing Opportunities’ mission-based programs are designed to address these housing challenges and to build sustainable and inclusive communities.

OUTCOME INDICATORS (100 words or less)

Anticipated Outcomes for SCIHO in 2019:

- 12 residents, prepared to move into Phase 1 of Switchyard Apartments including at least 4 people with disabilities.
 - 5,000 users of the Housing4Hoosiers.org website
 - 115 attendees at the semi-annual Tenant/Landlord Education Series
 - 350 copies distributed of “Renting in Indiana: A Handbook for Tenants and Landlords”
 - 1,120 direct technical assistance to low-income renters via the Housing Navigators, Tenant Assistance Table, and other outreach efforts.
-

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.

Why did the construction timeline for Phase 1 of Switchyard Apartments take longer than planned?

- The original timeline for the development of Phase 1 of Switchyard Apartments anticipated beginning construction in July 2018, with completion in early 2019.
- We produced our project pro forma in April 2017 in consultation with a seasoned developer and the project architect. Our original budget anticipated costs at construction costs of \$175 per square foot.
- SCIHO assembled all our financing from several loans and grants for the project in Fall 2017 and continued with the entitlement and planning process.
- When we opened construction bids in June 2018, actual costs had risen to \$200 per square foot. This created a daunting gap in our sources for the project. Value engineering efforts helped to reduce, but did not fully eliminate this gap.

South Central Indiana Housing Opportunities

- In August 2018, SCIHO restructured our financing for the project and applied for an additional, lower-interest construction loan from the Indiana Housing and Community Development Authority continue with the project.
- The additional time needed to apply for the IHEDA development fund loan lengthened the project timeline.

What are SCIHO's other sources of revenue?

SCIHO started in late 2015 with seed funding from the Bloomington Housing Authority to serve as an independent nonprofit that can address critical housing needs in our community. However, these starter funds have been spent down. Our 5-year strategic plan outlines how SCIHO will grow our programs, capacity, and revenue sources. Developing new affordable housing meets our mission and generates a developer fee that can help fund our operations. However, housing development is a time- and resource-intensive effort, and a project can take several years to complete. Thus, SCIHO is working to increase and diversify our revenue sources to chart a course for financial stability. Specific steps to grow our fundraising capacity to include board and advisor development, harnessing donor engagement and retention, and outreach to expand our donor base. We have also initiated planning for an annual fundraising event to support financial sustainability.



South Central Indiana Housing Opportunities

STATEMENT OF ACTIVITY

January - December 2018

| | TOTAL |
|---------------------------------------|----------------------|
| Revenue | |
| City Grant Revenue | 12,718.85 |
| NAP Tax Credit Revenue | 1,580.00 |
| Private Donations | 5,528.77 |
| Private Foundation Grant Revenue | 9,469.00 |
| Public Donations | 4,500.00 |
| Sales | 850.00 |
| Total Revenue | \$34,646.62 |
| GROSS PROFIT | \$34,646.62 |
| Expenditures | |
| Administrative Expense | |
| Accounting Fees | 1,697.87 |
| Admin Support Fees | 3,460.00 |
| Legal & Professional Services | 113.75 |
| Membership Dues | 125.00 |
| Office Supplies | 139.18 |
| Other General Expense | 500.00 |
| Rent & Lease | 404.00 |
| Training | 542.40 |
| Travel | 35.45 |
| Website Maintenance | 149.00 |
| Total Administrative Expense | 7,166.65 |
| Advertising & Marketing | |
| Advertising & Marketing | 405.24 |
| Bank Charges & Fees | |
| Bank Charges & Fees | 89.93 |
| Insurance | |
| Directors and Officials Insurance | 833.00 |
| General Liability Insurance | 1,620.00 |
| Worker's Compensation Insurance | 364.00 |
| Total Insurance | 2,817.00 |
| Payroll Expenses | |
| Taxes | 5,743.09 |
| Wages | 74,925.54 |
| Total Payroll Expenses | 80,668.63 |
| Program Delivery Expense | |
| Program Delivery Expense | 280.00 |
| Communications Plan | 775.00 |
| Housing 4 Hoosiers | 3,645.79 |
| Total Program Delivery Expense | 4,700.79 |
| Total Expenditures | \$95,848.24 |
| NET OPERATING REVENUE | \$ -61,201.62 |
| NET REVENUE | \$ -61,201.62 |



South Central Indiana Housing Opportunities

STATEMENT OF FINANCIAL POSITION

As of December 31, 2018

| | TOTAL |
|--|----------------------|
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| 1000 TOTAL BUS CHK (5913) | 8,212.58 |
| Total Bank Accounts | \$8,212.58 |
| Accounts Receivable | |
| 1100 Accounts Receivable (A/R) | 0.00 |
| Total Accounts Receivable | \$0.00 |
| Total Current Assets | \$8,212.58 |
| Other Assets | |
| Construction Work in Progress | 19,468.62 |
| Total Other Assets | \$19,468.62 |
| TOTAL ASSETS | \$27,681.20 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Accounts Payable | |
| 2010 Accounts Payable (A/P) | 0.00 |
| Total Accounts Payable | \$0.00 |
| Other Current Liabilities | |
| 2130 Payroll Liabilities | |
| 2131 Federal Taxes (941/944) | 1,713.84 |
| 2132 Federal Unemployment (940) | 0.00 |
| 2133 IN Income / Local Taxes | 242.16 |
| 2134 IN Unemployment Tax | 0.00 |
| Total 2130 Payroll Liabilities | 1,956.00 |
| Direct Deposit Payable | 0.00 |
| Line of Credit | 25,000.00 |
| Loan Payable | 20,000.00 |
| Total Other Current Liabilities | \$46,956.00 |
| Total Current Liabilities | \$46,956.00 |
| Total Liabilities | \$46,956.00 |
| Equity | |
| Retained Earnings | 41,926.82 |
| Net Revenue | -61,201.62 |
| Total Equity | \$ -19,274.80 |
| TOTAL LIABILITIES AND EQUITY | \$27,681.20 |

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

South Central Indiana Housing Opportunities
DEPARTMENT OF THE TREASURY

Date: **DEC 23 2015**

SOUTH CENTRAL INDIANA HOUSING
OPPORTUNITIES CORPORATION
1007 NORTH SUMMITT ST
BLOOMINGTON, IN 47404-3172

Employer Identification Number:
47-1012649
DLN:
17053167316045
Contact Person:
RONALD D BELL ID# 31185
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
March 28, 2014
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

REC'D DEC 28 A.M.

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. 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.

Letter 947

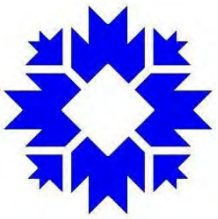
SOUTH CENTRAL INDIANA HOUSING

Sincerely,

A handwritten signature in black ink, appearing to read "J. Cooper", written in a cursive style.

Jeffrey I. Cooper
Director, Exempt Organizations
Rulings and Agreements

Letter 947



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Special Olympics Indiana Monroe County

Address: 6180 N. Bottom Rd., Bloomington, IN 47404

Phone: 812-340-0955

E-Mail: soimc.cc@gmail.com

Website: www.soindiana.org (state-wide website, local programs do not maintain websites)

President of Board of Directors: N/A, Board Chair only

Name of Executive Director: Ron Stiver, State Board Chair

Phone: 317-328-2006

E-Mail: Not Available

Name and Title of Person to Present Proposal to the Committee: Denise Brown, County Coordinator
Morgan Taylor, Fundraising Coordinator

Phone: 812-340-0955

E-Mail: soimc.cc@gmail.com

Name of Grant Writer: Morgan Taylor

Phone: 832-794-7010

E-Mail: morgan.l.taylor@navy.mil

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [x] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|---|
| 0 | 0 | ~100* |
| | | *including 8 local Coordinators/local board |

AGENCY MISSION

(150 words or less)

STATEMENT

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 (ages 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. 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**Project Name:** *Athlete Expansion Support***Total cost of project:** \$27,686.23**Requested amount of JHSSF funding:** \$11,563.16**Total number of City residents anticipated to be served by this project in 2019:** 180-200**Total number of clients anticipated to be served by this project in 2019:** 200-250**PROJECT SYNOPSIS** (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

ASK:

SOIMC seeks a one-time investment of \$11,563.16 to purchase equipment and provide Team expansions to support the growing number of athletes requesting to participate on sports teams as well as provide functional equipment and uniforms.

NEED:

Providing an accessible platform for individuals with disabilities within the City is vital for their continuous physical and mental stimulation. SOIMC provides multiple physical screenings as well as nutritional support to athletes to enhance health education and promote sustainable lifestyles. Current available funds do not provide the necessary funding to expand teams to allow for the steady influx of athletes SOIMC has encountered over the last three years (~14.2% per year), therefore creating a self-limiting scenario. It is increasingly important to maintain this support platform by expanding the Teams available for participation as well as quality equipment to continue to enhance the health and experience of those with disabilities in Bloomington.

BENEFITS:

The immediate benefits of this Expansion are:

1. Increase number of athletes are allowed to participate in local, regional, and state events as available Team spots are expanded.
2. Increase potential performance as available equipment is improved and expanded to support the growing Teams.
3. Results are realized as soon as the next sports season is available.
4. Increase sense of value and positivity within individuals regarding their community as new equipment and uniforms replace broken parts.
5. Improve athlete compliance and long-term involvement within the community, as athletes will not be turned away due to low availability of Team spots.

Address where project will be housed: 6180 N. Bottom Rd., 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 to capital improvements to real estate and if you do not own the property at which the project 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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

N/A

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

| Source | Amount | Status |
|-------------------------------|--------------|-----------|
| Knights of Columbus | \$ 3,185.00 | Confirmed |
| Fundraising and Contributions | \$ 12,938.07 | Confirmed |

Please 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 as equipment is acquired. Claims for Team expansions will be submitted on a rolling basis as each sporting season or competition is completed.

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 leverages funds in several ways.

Other Funds:

1. The Knights of Columbus have provided a funding discount for the Summer Games in the amount of \$3,185.00.
2. Various fundraisers and contributions have provided a value of \$12,938.07 for Team Expansions and game registrations as of 31-DEC-2018.

In-kind:

1. Facilities for major sporting events are provided by various entities within the City including but not limited to Bloomington High School South, Classic Lanes Bowling, and Indiana University.

Volunteers:

1. All coaching, staffing, support, and County organization is volunteer-based.

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|--------------------|--|------------|
| Priority #1 | Sporting Uniforms | \$3,909.40 |
| Priority #2 | Bowling Ramps | \$474.95 |
| Priority #3 | Gymnastic Supplies | \$294.90 |
| Priority #4 | Sports Equipment | \$3,276.11 |
| Priority #5 | Team Expansions (less leveraged funds) | \$3,607.80 |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

SOURCE: According to SCAN 2012, an increasing number of children and young adults are being placed on waitlists for programs that support individuals with disabilities. The study indicated that nearly a third of households in Monroe reported having difficulties receiving services for children with learning disabilities. While an average rate of disability is difficult to depict, Monroe County residents indicated a disability rate of 13% for those aged 5 or older.

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.

NEED: Both SCAN and HAND's 2015-2019 Consolidated Plan note that providing opportunities for individuals with disabilities to interact within their community and 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 and long-term interactions and support.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

SOIMC seeks a one-time investment from the JHSSF to purchase equipment and provide Team expansions 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 with 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 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)

Explain how your program will have broad and long-lasting benefits for our community.

As the number of residents with disabilities seeking social interaction 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 also supporting self-growth and emotional connection.

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 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)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

This funding request is for equipment to last indefinitely as well as Team expansions to last 12 months. The outcome indicators:

- In the course of 12 months, 80% of sporting teams will have the required equipment to allow athletes to participate at a high level of competition previously not acquired due to outdated and/or broken equipment.
- In the course of 12 months, we will see an increase in the number of athletes served near the previous growth ratio of 14.2%.
- In the course of 12 months, we will see an increase in the number of athletes participating for Monroe County at the State Indoor Games, as well as Bowling League.

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.

The Monroe County Special Olympics is housed under the umbrella of Indiana Special Olympics, 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, nor does SOIMC receive federal or state-appropriated funds. With a "No Second Knock" policy, large sponsors at the local level continue to decrease as state and national corporate partnerships continue to increase. As the number of athletes in the local area continues to increase, operational costs to support as many teams as possible remains the priority, with availability of crucial handicap equipment, uniforms, and standard sporting gear remaining secondary to avenues for participation. Furthermore, a greater influx of new athletes and individuals needing support they no longer receive through school systems is highly anticipated should the Special Olympics Unified Funding (separate entity) from the Department of Education be cut.

Jack Hopkins Social Services Funding Application for 2019

Special Olympics of Monroe County Project Budget

| Item | Price | Quantity/Growth Percentage | Total |
|--------------------------------------|--------------|----------------------------|--------------|
| I. Equipment and Uniforms | | | |
| Gymnastics: Ribbons/Ribbon Stick | \$ 13.50 | 10 | \$ 135.00 |
| Gymnastics: Gym Ball | \$ 15.99 | 10 | \$ 159.90 |
| Corn Toss Set | \$ 131.49 | 10 | \$ 1,314.90 |
| Corn Toss Scoreboard | \$ 15.99 | 10 | \$ 159.90 |
| Basketball: Basketball Bag | \$ 37.95 | 5 | \$ 189.75 |
| Basketball: Reversible Uniforms | \$ 26.99 | 30 | \$ 809.70 |
| Basketball: Basketballs | \$ 31.06 | 10 | \$ 310.60 |
| Basketball: Basketball Pump | \$ 11.97 | 3 | \$ 35.91 |
| Volleyball: Uniforms | \$ 11.99 | 30 | \$ 359.70 |
| Volleyball: Volleyballs | \$ 35.02 | 20 | \$ 700.40 |
| Volleyball: Volleyball Bag | \$ 37.95 | 5 | \$ 189.75 |
| Softball: Slow Pitch Balls (12 pack) | \$ 64.95 | 2 | \$ 129.90 |
| Flag Football: Flag Sets | \$ 24.50 | 10 | \$ 245.00 |
| Bowling: Ramps | \$ 94.99 | 5 | \$ 474.95 |
| Bowling: Uniforms | \$ 27.40 | 100 | \$ 2,740.00 |
| | | Sub-Total | \$ 7,955.36 |
| II. Team Expansions | | | |
| Fall Bowling Tournament Fees | \$ 1,415.00 | 14.20% | \$ 1,615.93 |
| Basketball Tournament Fees | \$ 320.00 | 14.20% | \$ 365.44 |
| Area Spring Games Entry Fees | \$ 192.00 | 14.20% | \$ 219.26 |
| Summer Game Fees* | \$ 10,185.00 | 14.20% | \$ 11,631.27 |
| Travel/Lodging for Summer Games | \$ 4,290.47 | 14.20% | \$ 4,899.72 |
| EKS Game Fees | \$ 875.00 | 14.20% | \$ 999.25 |
| | | Sub-Total | \$ 19,730.87 |
| III. Leveraged Funds | | | |
| Knights of Columbus | \$ 3,185.00 | | \$ 3,185.00 |
| Fundraising and Contributions | \$ 12,938.07 | | \$ 12,938.07 |
| | | Total Project | \$ 27,686.23 |
| | | TOTAL REQUESTED | \$ 11,563.16 |



Department of the Treasury
Internal Revenue Service

P.O. Box 2508, Room 4010
Cincinnati OH 45201

Special Olympics

In reply refer to: 4077556534

June 04, 2015 LTR 4168C 0

35-1262574 000000 00

00032690

BODC: TE

INDIANA SPECIAL OLYMPICS INC
6200 TECHNOLOGY CENTER DRIVE STE 10
INDIANAPOLIS IN 46278-6003

Employer Identification Number: 35-1262574
Person to Contact: S LENARD
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your May 13, 2015, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(03) of the Internal Revenue Code in a determination letter issued in May 1972.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

4077556534

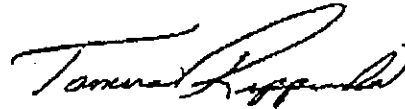
June 04, 2015 LTR 4168C 0
35-1262574 000000 00

00032691

INDIANA SPECIAL OLYMPICS INC
6200 TECHNOLOGY CENTER DRIVE STE 10
INDIANAPOLIS IN 46278-6003

If you have any questions, please call us at the telephone number
shown in the heading of this letter.

Sincerely yours,



Tamera Ripperda
Director, Exempt Organizations

Special Olympics Indiana Income Statement

483 - Monroe County**Revenues**

| | | <u>As of 12/31/2018 PRELIMINA</u> | <u>As of 12/31/2017</u> |
|-----------------------|---|---|-----------------------------|
| 483-40125-999 | Special Event Revenue Received from Chapter | \$2,599.20 | \$465.00 |
| 483-40275-999 | Fundraising Revenue (A & L's only) | \$4,336.57 | \$16,426.22 |
| 483-40400-999 | Contributions | \$5,911.00 | \$1,095.00 |
| 483-49500-999 | Funds Received from Chapter | \$91.30 | \$567.50 |
| Total Revenues | | <u>\$12,938.07</u> | <u>\$18,553.72</u> |

Expenses

| | | | |
|-----------------------|--|---------------------------|---------------------------|
| 483-50275-999 | Consulting & Professional Fees | \$0.00 | \$5,300.00 |
| 483-50300-999 | Office Supplies | \$100.09 | \$236.14 |
| 483-50315-999 | Supplies - Other | \$917.05 | \$250.91 |
| 483-50600-999 | Printing - General | \$0.00 | \$41.29 |
| 483-50775-999 | Facility Rental Expense | \$537.50 | \$518.50 |
| 483-51100-999 | Travel & Transportation | \$1,477.00 | \$1,530.50 |
| 483-51125-999 | Meals & Lodging | \$337.22 | \$25.02 |
| 483-51150-999 | Staff and Volunteer Recognition and Memorials | \$0.00 | \$298.42 |
| 483-51200-999 | Conference Registration Fees | \$0.00 | \$120.00 |
| 483-56050-999 | Staff & Volunteer Shirts | \$285.00 | \$0.00 |
| 483-56055-999 | Uniform Expense | \$795.88 | \$2,255.69 |
| 483-56095-999 | Games Expense Paid to A & C's | \$490.00 | \$0.00 |
| 483-56100-999 | Games Exp/Conf Fees Paid to Chapter (A&C's onl | \$8,790.00 | \$12,125.00 |
| 483-58500-999 | Funds Paid To Other A & L's (A & L's only) | \$1,188.00 | \$1,787.00 |
| 483-59000-999 | Dues & Subscriptions | \$0.00 | \$45.00 |
| 483-59050-999 | Bank Charges | \$34.25 | \$0.00 |
| 483-59600-999 | Funds paid to Chapter for other | \$20.00 | \$0.00 |
| Total Expenses | | <u>\$14,971.99</u> | <u>\$24,533.47</u> |

Transfers

| | | | |
|---------------------------------|-------------------------------|----------------------|--------------------------|
| 483-79001-999 | Carry-Over Funds for Counties | \$0.00 | (\$2,500.00) |
| Total Transfers (Out)/In | | <u>\$0.00</u> | <u>\$2,500.00</u> |

NET SURPLUS/(DEFICIT)

| | | |
|--|----------------------------|----------------------------|
| | <u>(\$2,033.92)</u> | <u>(\$3,479.75)</u> |
|--|----------------------------|----------------------------|

Special Olympics Indiana
Cash Account Activity 2018
PRELIMINARY

Special Olympics

| Date | Trans. | Reference | Balance |
|-----------------|--|---|---------------|
| | 483-10005-000 | | |
| Account: | 483-10005-000 (Fifth Third Cash Account (A & L's only)) | | |
| 1/1/2018 | | <i>Account Beginning Balance</i> | \$ 12,944.25 |
| 1/3/2018 | 15240-111 | Rural Transit-Computer Check-17263 | \$ (112.00) |
| 1/8/2018 | 15391-92 | Transfer: Basketball Teams Entry Fees #1 | \$ (280.00) |
| 1/10/2018 | 15254-206 | Nite Owl Promotions-Computer Check-17277 | \$ (260.50) |
| 2/12/2018 | 15491-55 | Transfer: Basketball Team Skills Entry Fees | \$ (40.00) |
| 2/28/2018 | 15655-1 | Deposit 7352 - Summarized Cash Receipts Receipt | \$ 38.86 |
| 3/20/2018 | 15584-32 | Transfer: Extra 2018 P.I.G. Copy | \$ (20.00) |
| 3/26/2018 | 15665-302 | Fifth Third Bank-Bank Draft-116 | \$ (83.43) |
| 3/27/2018 | 15613-72 | Transfer: Refunds State Basketball | \$ 40.00 |
| 3/28/2018 | 15615-131 | Rural Transit-Computer Check-17490 | \$ (215.00) |
| 4/20/2018 | 15830-4 | Deposit 7486 - Summarized Cash Receipts Receipt | \$ 3,000.00 |
| 4/23/2018 | 15841-252 | Fifth Third Bank-Bank Draft-117 | \$ (319.20) |
| 5/2/2018 | 15753-133 | Rural Transit-Computer Check-17561 | \$ (222.00) |
| 5/2/2018 | 15762-57 | Transfer: Polar Plunge Revenue Share | \$ 2,599.20 |
| 5/3/2018 | 15831-27 | Deposit 7533 - Summarized Cash Receipts Receipt | \$ 57.91 |
| 5/3/2018 | 15986-1 | Deposit 7609 - Summarized Cash Receipts Receipt | \$ 611.00 |
| 5/6/2018 | 15990-9 | Transfer: Area 07 Spring Games Entry Fees | \$ (192.00) |
| 5/12/2018 | 15834-12 | Deposit 7552 - Summarized Cash Receipts Receipt | \$ 2,888.60 |
| 5/22/2018 | 15985-133 | Fifth Third Bank-Bank Draft-118 | \$ (337.22) |
| 5/25/2018 | 15968-98 | Transfer: Summer Games Entry Fees | \$ (7,000.00) |
| 6/8/2018 | 16132-8 | Transfer: Area 07 Summer Games T-Shirts | \$ (891.00) |
| 6/18/2018 | 16111-72 | Transfer: EKS Team Entry Fees | \$ (490.00) |
| 6/22/2018 | 16158-592 | Fifth Third Bank-Bank Draft-119 | \$ (433.08) |
| 7/20/2018 | 16238-47 | Deposit 7725 - Summarized Cash Receipts Receipt | \$ 900.00 |
| 7/26/2018 | 16238-68 | Deposit 7740 - Summarized Cash Receipts Receipt | \$ 50.00 |
| 7/28/2018 | 16133-28 | Tfr: Johnson Co. Softball Invite Entry Fees | \$ (105.00) |
| 7/28/2018 | 16238-73 | Deposit 7743 - Summarized Cash Receipts Receipt | \$ 999.14 |
| 7/30/2018 | 16315-37 | Transfer: EKS Entry Fees #2 - Golf | \$ (150.00) |
| 8/6/2018 | 16316-73 | Tfr:EKS Entry Fees #3-EQ,CT,DRW,Skills excluding GO | \$ (305.00) |
| 8/15/2018 | 16211-128 | Rural Transit-Computer Check-17907 | \$ (192.00) |
| 8/15/2018 | 16211-172 | Brian White-Computer Check-17882 | \$ (160.80) |
| 9/5/2018 | 16337-176 | Dipankar Mukhopadhyay-7832-Donation & CC Fee-23797 | \$ (34.25) |
| 9/5/2018 | 16337-46 | Deposit 7832 - Summarized Cash Receipts Receipt | \$ 1,000.00 |
| 9/8/2018 | 16337-62 | Deposit 7849 - Summarized Cash Receipts Receipt | \$ 76.58 |
| 9/12/2018 | 16289-298 | Rural Transit-Computer Check-17992 | \$ (75.00) |
| 9/17/2018 | 16332-25 | Transfer: EKS Games Golf Cart Fees | \$ (15.00) |
| 9/21/2018 | 16467-204 | Fifth Third Bank-Bank Draft-122 | \$ (333.50) |
| 10/2/2018 | 16463-36 | Deposit 7928 - Summarized Cash Receipts Receipt | \$ 350.00 |
| 10/24/2018 | 16485-73 | Tfr: Champions Together Rev Share 2017-18 School Year | \$ 91.30 |
| 10/31/2018 | 16511-123 | Rural Transit-Computer Check-18148 | \$ (115.00) |
| 11/7/2018 | 16522-68 | Transfer: State Conference Fees | \$ (100.00) |
| 11/14/2018 | 16596-12 | Deposit 8052 - Summarized Cash Receipts Receipt | \$ 75.48 |
| 11/23/2018 | 16751-448 | Fifth Third Bank-Bank Draft-124 | \$ (776.63) |
| 12/5/2018 | 16631-89 | Transfer: State Bowling Entry Fees | \$ (450.00) |
| 12/10/2018 | 16752-27 | Deposit 8113 - Summarized Cash Receipts Receipt | \$ 200.00 |
| 12/12/2018 | 16670-5 | Transfer: Area 7 Bowling Entry Fees | \$ (490.00) |
| 12/19/2018 | 16730-176 | Rural Transit-Computer Check-18318 | \$ (208.00) |
| 12/19/2018 | 16730-178 | Mark Deckard-Computer Check-18311 | \$ (450.00) |
| 12/21/2018 | 16925-399 | Fifth Third Bank-Bank Draft-125 | \$ (203.90) |
| 12/31/2018 | 16938-88 | Fifth Third Bank-Bank Draft-126 | \$ (324.98) |
| 12/31/2018 | | <i>Account Net Change</i> | \$ (2,406.42) |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 10,537.83 |
| 1/1/2018 | | <i>Fund Beginning Balance</i> | \$ 12,944.25 |
| 12/31/2018 | | <i>Fund Net Change</i> | \$ (2,406.42) |
| 12/31/2018 | | <i>Fund Ending Balance</i> | \$ 10,537.83 |

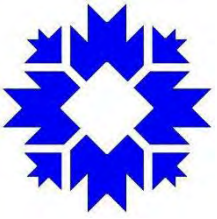
| Date | Trans. | Reference | Balance |
|-----------------|--|--|---|
| | 483-40125-999 | | |
| Account: | 483-40125-999 (Special Event Revenue Received from Chapter) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 5/2/2018 | 15762-22 | Transfer: Polar Plunge Revenue Share | \$ 2,599.20 |
| | | | <i>Account Subtotals</i> |
| | | | \$ 2,599.20 |
| 12/31/2018 | | | <i>Account Net Change</i> \$ 2,599.20 |
| 12/31/2018 | | | <i>Account Ending Balance</i> \$ 2,599.20 |
| | 483-40275-999 | | |
| Account: | 483-40275-999 (Fundraising Revenue (A & L's only)) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 2/28/2018 | 15655-21 | Kroger-7352-Community Rewards-22906 | \$ 38.86 |
| 5/3/2018 | 15831-72 | Kroger-7533-Community Rewards-23209 | \$ 57.91 |
| 5/12/2018 | 15834-49 | Indiana Youth Sports-7552-Fundraiser-23261 | \$ 2,888.60 |
| 7/28/2018 | 16238-158 | Indiana Youth Sports-7743-IU Concession Fundraiser-23619 | \$ 999.14 |
| 9/8/2018 | 16337-198 | Kroger-7849-Community Rewards-23823 | \$ 76.58 |
| 11/14/2018 | 16596-42 | Kroger-8052-Community Rewards-24181 | \$ 75.48 |
| 12/10/2018 | 16752-66 | USBC Bowling Assoc.-8113-Fundraiser-24299 | \$ 200.00 |
| | | | <i>Account Subtotals</i> |
| | | | \$ 4,336.57 |
| 12/31/2018 | | | <i>Account Net Change</i> \$ 4,336.57 |
| 12/31/2018 | | | <i>Account Ending Balance</i> \$ 4,336.57 |
| | 483-40400-999 | | |
| Account: | 483-40400-999 (Contributions) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 4/20/2018 | 15830-45 | Cook-7486-Donation-23118 | \$ 3,000.00 |
| 5/3/2018 | 15986-28 | US Savings Bank-no check copy-7609-Donation-23387 | \$ 300.00 |
| 5/3/2018 | 15986-29 | Domino's Pizza-no check copy-7609-Donation-23388 | \$ 311.00 |
| 7/20/2018 | 16238-122 | Various checks-7725-Donations-23580 | \$ 400.00 |
| 7/20/2018 | 16238-123 | Premier Health-7725-Donation-23581 | \$ 500.00 |
| 7/26/2018 | 16238-152 | Patricia Conrad-7740-Donation-23613 | \$ 50.00 |
| 9/5/2018 | 16337-175 | Dipankar Mukhopadhyay-7832-Donation & CC Fee-23797 | \$ 1,000.00 |
| 10/2/2018 | 16463-94 | Various checks-7928-Donations-23952 | \$ 350.00 |
| | | | <i>Account Subtotals</i> |
| | | | \$ 5,911.00 |
| 12/31/2018 | | | <i>Account Net Change</i> \$ 5,911.00 |
| 12/31/2018 | | | <i>Account Ending Balance</i> \$ 5,911.00 |

| Date | Trans. | Reference | Balance |
|-----------------|--|--|---|
| | 483-49500-999 | | |
| Account: | 483-49500-999 (Funds Received from Chapter) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 10/24/2018 | 16485-29 | Tfr: Champions Together Rev Share 2017-18 School Year | \$ 91.30 |
| | | | <i>Account Subtotals</i> |
| | | | \$ 91.30 |
| 12/31/2018 | | | <i>Account Net Change</i> \$ 91.30 |
| 12/31/2018 | | | <i>Account Ending Balance</i> \$ 91.30 |
| | 483-50300-999 | | |
| Account: | 483-50300-999 (Office Supplies) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 3/26/2018 | 15665-189 | Fifth Third Ban-32618-2/2018 County CC's-ink | \$ 72.75 |
| 6/22/2018 | 16158-229 | Fifth Third Ban-62218-5/2018 County CC's-receipt books | \$ 10.68 |
| 11/23/2018 | 16751-312 | Fifth Third Ban-112318-10/2018 County CC's-county tourn supplies | \$ 16.66 |
| | | | <i>Account Subtotals</i> |
| | | | \$ 100.09 |
| 12/31/2018 | | | <i>Account Net Change</i> \$ 100.09 |
| 12/31/2018 | | | <i>Account Ending Balance</i> \$ 100.09 |
| | 483-50315-999 | | |
| Account: | 483-50315-999 (Supplies - Other) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 3/26/2018 | 15665-187 | Fifth Third Ban-32618-2/2018 County CC's-receipt book | \$ 10.68 |
| 4/23/2018 | 15841-155 | Fifth Third Ban-42318-3/2018 County CC's-bballs | \$ 133.70 |
| 4/23/2018 | 15841-156 | Fifth Third Ban-42318-3/2018 County CC's-bballs | \$ 123.00 |
| 8/15/2018 | 16211-75 | Brian White-072518 BW-Reimb Softball Equipment/- | \$ 160.80 |
| 11/23/2018 | 16751-310 | Fifth Third Ban-112318-10/2018 County CC's-bowling ramps | \$ 284.97 |
| 12/21/2018 | 16925-217 | Fifth Third Ban-122118-11/2018 County CC's-bb's,pump,bags | \$ 203.90 |
| | | | <i>Account Subtotals</i> |
| | | | \$ 917.05 |
| 12/31/2018 | | | <i>Account Net Change</i> \$ 917.05 |
| 12/31/2018 | | | <i>Account Ending Balance</i> \$ 917.05 |
| | 483-50775-999 | | |
| Account: | 483-50775-999 (Facility Rental Expense) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 4/23/2018 | 15841-154 | Fifth Third Ban-42318-3/2018 County CC's-bball facilities - twin lakes | \$ 62.50 |
| 11/23/2018 | 16751-308 | Fifth Third Ban-112318-10/2018 County CC's-classic lanes bowling | \$ 475.00 |
| | | | <i>Account Subtotals</i> |
| | | | \$ 537.50 |
| 12/31/2018 | | | <i>Account Net Change</i> \$ 537.50 |
| 12/31/2018 | | | <i>Account Ending Balance</i> \$ 537.50 |
| | 483-51100-999 | | |
| | | | 511 |

| Date | Trans. | Reference | Balance |
|-----------------|---|---|----------------------------------|
| Account: | 483-51100-999 (Travel & Transportation) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 3/28/2018 | 15615-42 | Rural Transit-15198-Transport to Basketball H- | \$ 98.00 |
| 3/28/2018 | 15615-44 | Rural Transit-15209-Transport to Basketball T- | \$ 117.00 |
| 5/2/2018 | 15753-87 | Rural Transit-15249-Basketball Transport to H- | \$ 100.00 |
| 5/2/2018 | 15753-91 | Rural Transit-15247-Basketball Transport to S- | \$ 122.00 |
| 8/15/2018 | 16211-153 | Rural Transit-15348-Roundtrip Transport/Summe- | \$ 192.00 |
| 9/12/2018 | 16289-38 | Rural Transit-15372-Transport to Johnson Co. - | \$ 75.00 |
| 10/31/2018 | 16511-56 | Rural Transit-15438-Transport to Pike Twp. Ro- | \$ 115.00 |
| 12/17/2018 | 16730-52 | Mark Deckard-121618 MD-Transportation to ISU/Sum- | \$ 450.00 |
| 12/19/2018 | 16730-80 | Rural Transit-15480-Roundtrip Transport to St- | \$ 95.00 |
| 12/19/2018 | 16730-82 | Rural Transit-15479-Transport to Southland Bo- | \$ 113.00 |
| | | <i>Account Subtotals</i> | \$ 1,477.00 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 1,477.00 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 1,477.00 |
| | 483-51125-999 | | |
| Account: | 483-51125-999 (Meals & Lodging) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 5/22/2018 | 15985-255 | Fifth Third Ban-52218-4/2018 County CC's-HuHot grill - bball dinner | \$ 337.22 |
| | | <i>Account Subtotals</i> | \$ 337.22 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 337.22 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 337.22 |
| | 483-56050-999 | | |
| Account: | 483-56050-999 (Staff & Volunteer Shirts) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 12/31/2018 | 16938-295 | Fifth Third Ban-12219 for -12/2018 County CC-coaches shirts | \$ 285.00 |
| | | <i>Account Subtotals</i> | \$ 285.00 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 285.00 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 285.00 |

| Date | Trans. | Reference | Balance |
|-----------------|--|---|----------------------------------|
| | 483-56055-999 | | |
| Account: | 483-56055-999 (Uniform Expense) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 6/22/2018 | 16158-228 | Fifth Third Ban-62218-5/2018 County CC's-golf shirts | \$ 422.40 |
| 9/21/2018 | 16467-431 | Fifth Third Ban-92118-8/2018 County CC's-NO RECT DB - my sports | \$ 333.50 |
| 12/31/2018 | 16938-294 | Fifth Third Ban-12219 for -12/2018 County CC-pinnies BB | \$ 39.98 |
| | | <i>Account Subtotals</i> | \$ 795.88 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 795.88 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 795.88 |
| | 483-56095-999 | | |
| Account: | 483-56095-999 (Games Expense Paid to A & C's) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 12/12/2018 | 16670-1 | Transfer: Area 7 Bowling Entry Fees | \$ 490.00 |
| | | <i>Account Subtotals</i> | \$ 490.00 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 490.00 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 490.00 |
| | 483-56100-999 | | |
| Account: | 483-56100-999 (Games Exp/Conf Fees Paid to Chapter (A&C's only)) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 1/8/2018 | 15391-35 | Transfer: Basketball Teams Entry Fees #1 | \$ 280.00 |
| 2/12/2018 | 15491-22 | Transfer: Basketball Team Skills Entry Fees | \$ 40.00 |
| 3/27/2018 | 15613-28 | Transfer: Refunds State Basketball | \$ (40.00) |
| 5/25/2018 | 15968-37 | Transfer: Summer Games Entry Fees | \$ 7,000.00 |
| 6/18/2018 | 16111-30 | Transfer: EKS Team Entry Fees | \$ 490.00 |
| 7/30/2018 | 16315-15 | Transfer: EKS Entry Fees #2 - Golf | \$ 150.00 |
| 8/6/2018 | 16316-28 | Tfr:EKS Entry Fees #3-EQ,CT,DRW,Skills excluding GO | \$ 305.00 |
| 9/17/2018 | 16332-11 | Transfer: EKS Games Golf Cart Fees | \$ 15.00 |
| 11/7/2018 | 16522-25 | Transfer: State Conference Fees | \$ 100.00 |
| 12/5/2018 | 16631-36 | Transfer: State Bowling Entry Fees | \$ 450.00 |
| | | <i>Account Subtotals</i> | \$ 8,790.00 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 8,790.00 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 8,790.00 |

| Date | Trans. | Reference | Balance |
|-----------------|---|---|----------------------------------|
| | 483-58500-999 | | |
| Account: | 483-58500-999 (Funds Paid To Other A & L's (A & L's only)) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 5/6/2018 | 15990-4 | Transfer: Area 07 Spring Games Entry Fees | \$ 192.00 |
| 6/8/2018 | 16132-4 | Transfer: Area 07 Summer Games T-Shirts | \$ 891.00 |
| 7/28/2018 | 16133-12 | Tfr: Johnson Co. Softball Invite Entry Fees | \$ 105.00 |
| | | <i>Account Subtotals</i> | \$ 1,188.00 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 1,188.00 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 1,188.00 |
| | 483-59050-999 | | |
| Account: | 483-59050-999 (Bank Charges) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 9/5/2018 | 16337-45 | Deposit 7832 - Summarized Cash Receipts Receipt | \$ 34.25 |
| | | <i>Account Subtotals</i> | \$ 34.25 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 34.25 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 34.25 |
| | 483-59600-999 | | |
| Account: | 483-59600-999 (Funds paid to Chapter for other) | | |
| 1/1/2018 | | | <i>Account Beginning Balance</i> |
| 3/20/2018 | 15584-13 | Transfer: Extra 2018 P.I.G. Copy | \$ 20.00 |
| | | <i>Account Subtotals</i> | \$ 20.00 |
| 12/31/2018 | | <i>Account Net Change</i> | \$ 20.00 |
| 12/31/2018 | | <i>Account Ending Balance</i> | \$ 20.00 |



**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Volunteers in Medicine Clinic of Monroe County, Inc.

Address: PO Box 2568, Bloomington, IN 46402

Phone: 812-333-4001

E-Mail: info@vimmonroecounty.org

Website: www.vimmonroecounty.org

President of Board of Directors: Victor Malinovsky

Name of Executive Director: Nancy E. Richman

Phone: 812-333-4032

E-Mail: nrichman@vimmonroecounty.org

Name and Title of Person to Present Proposal to the Committee: Nancy Richman

Phone: 812-333-4032

E-Mail: nrichman@vimmonroecounty.org

Name of Grant Writer: Nancy Richman

Phone: 812-333-4032

E-Mail: nrichman@vimmonroecounty.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 8 | 6 | 65 |

AGENCY 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, Volunteers in Medicine provides the following services without cost to the medically underserved in Monroe and Owen counties:

- Easily accessible, high quality primary and preventive health care
- Treatment for both acute and chronic conditions
- Health education that empowers individuals to take responsibility for their own well-being

PROJECT INFORMATION

Project Name: *Ensuring Access to Urgent Medical Care for Uninsured People*

Total cost of project: \$53,741.88

Requested amount of JHSSF funding: \$24,800

Total number of City residents anticipated to be served by this project in 2019: 800

Total number of clients anticipated to be served by this project in 2019: 1000

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Volunteers in Medicine respectfully requests \$24,800 to help fund the clinic's emergency Walk-In services. The VIM Walk-In clinic gives uninsured people immediate access to medical care for urgent issues. As well as an alternative to visiting the emergency room (ER).

Since people often wait until they are sick to seek medical care, frequently new VIM patients arrive only when they need immediate medical attention. Because of our Walk-In Clinic we are able to have them enroll in VIM services, and at the same time, also see a practitioner for their urgent concern. The purpose of this request fits one of the high priority areas for JHSS funding: emergency medical care.

The benefits of VIM's walk-in clinic are:

1. **Provide on demand care** – No appointment is necessary; the individual doesn't have to wait for a provider's schedule to open up to be seen for an acute urgent issue.
2. **Quality care** - Walk-in clinicians specialize in treating minor emergencies and are trained to promptly treat urgent medical situations before they become life-threatening
3. **Saves the ER for emergencies** – When people use the VIM walk-in clinic, instead of seeking care at the ER, it frees up the ER to treat life-threatening emergencies.
4. **More efficient use of community resources** – The cost for VIM to provide walk-in services is much less than the cost of providing non-urgent care through emergency room services.
5. **Free to VIM patients** – More importantly, the service is free to the patient.

Address where project will be housed: 811 W. Second Street, 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 to capital improvements to real estate and if you do not own the property at which the project 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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

N/A

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):*

Volunteers in Medicine 2019 budget: \$28,936 – confirmed (seeking additional funding as well, n nothing confirmed)

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

Since funding is to pay for a walk-in provider salary, I will submit a claim every month from the end of June-November (6 claims).

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

FISCAL LEVERAGING *(100 words or less)*

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

Nurse Intake Volunteers: During 2018, 922 volunteer hours (RNs and others), valued at \$19,267, were used to assist with triage and intake of walk-in patients. This level of support is also expected in 2019 which allows our walk-in provider to focus on the medical care of her patients.

Cash: The VIM budget will pay for the rest of the walk-in NPs annual salary as, thus far, I have been unable to find additional funding to leverage.

The Jack Hopkins Social Services funding seems to be the ONLY funding that allows operational requests – for which I am immensely grateful.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, **will you be able to proceed with partial funding?**
 Yes No

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

| | Item | Cost |
|------------------------|---|---------------------------|
| Priority #1 | Funding to offset approximately 6 months of the Nurse Practitioner salary and fringe benefit costs to staff the Walk-In Clinic. (fringe benefit costs are 7.65% of base salary) <ul style="list-style-type: none"> • Salary • Fringe | \$23,040.00 \$1,765.56 |
| Priority #2 | Whatever funding we receive from the JHSS grant will offset part of the budget deficit. The executive director is seeking funding from as many sources as possible to mitigate the projected deficit. Rationale for determining this specific amount is detailed below. | |
| TOTAL REQUESTED | | \$24,800 |

Rationale:

- Salary was determined by the formula: \$48/hour * 20 hrs/wk * 24 wks = \$23,040
- Fringe is 7.65%

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2012 SCAN survey reported that despite the array of medical services offered locally our region still has a shortage of primary care clinicians. The report also notes that “(T)he waits for appointment times can be excessive.” Further, according to Brian Shockney, President/ CEO IUHB Hospital, 62% of the visits to the emergency room in 2018 were for non-emergent reasons (Email 2/21/2019).

One would have hoped that in the 7 years since the SCAN was conducted more providers would have been recruited to this area and wait times would have decreased. Unfortunately, this is not the case. In fact, new patient appointments are now being scheduled at the Southern IN Physician offices for the end of July and into August! At the same time, 14% of all patient visits to VIM in 2018 were walk-ins – 1,562 visits. Moreover, uninsured people tend to wait until they are very sick before seeking medical care. When they finally come to VIM, because of our walk-in clinic, we are able to have them enroll in VIM services and during the same visit also see a walk-in provider. Patients are able to get the treatment they need, when they need it, and avoid an expensive visit to the emergency room.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc.), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

This funding request is pursuant to the 2019 allowance for operational funding.

For the first time last year, VIM ended the year with a funding deficit. We project that 2019 will be even worse and are seeking funding from numerous sources to assist with the operational deficit. Walk-in services are among those that the clinic cannot do without; moreover, free urgent medical attention is a service that the community cannot do without! (plan for future funding addressed in detail below)

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

The provision of walk-in services at the VIM free clinic has many long-term benefits for the community:

1. **Reduces non-emergent visits to the ER:** The large number of non-emergent visits to the emergency room is hugely expensive. The VIM walk-in clinic is an alternative to the ER. Unfortunately, because VIM doesn't have after hours emergency services, people are still forced to use the ER. We hope to alleviate this in the future.
2. **Provides easy access to care:** The VIM Walk-In clinic is often the entry point for long-term care for people with serious medical conditions. Many people only seek medical care when they have become too sick to wait any longer.
3. **Coincides with insurance enrollment:** Any U.S. citizen that comes to VIM is helped to enroll in an appropriate insurance plan, thus enabling the person to gain entry into the broader healthcare system. The individual is seen in walk-in and assisted with their insurance enrollment in the same visit.
4. **Offers culturally competent care:** The VIM walk-in nurse practitioner is fully bilingual in Spanish – a great help to our Hispanic patients.

VIM, by its very existence “*has broad and long-lasting benefits for our community*” (SCAN). We are the only source of free urgent care in Bloomington.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

1. Number of people seen in the Walk-in clinic
2. Number of patient visits to the Walk-In clinic during the 6-month period (June-December 2019) and compared to same period in 2018.
3. Case examples of how the walk-in appointment was critical to the individual's health and well-being.

We will also try to report (if we can through the EMR):

4. Number of people enrolled in insurance that initially came to Walk-in.
5. Number of people seen in walk-in that were sent to the ER for a life-threatening 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.

FINAL COMMENT:

The obvious question that the Committee is likely to ask is: *With a budget deficit in 2018 and another projected for 2019, what is VIM doing to sustain its capacity to serve the uninsured and medically underserved population of Monroe County into the future?*

There is no doubt that, even with the Affordable Care Act and the Medicaid alternative, Healthy IN Plan 2.0, thousands of people continue to fall through the cracks of our healthcare system. The needs are great and the VIM mission is to ensure that every resident of Monroe County continues to have access to affordable, accessible, and compassionate healthcare regardless of financial, cultural, or social barriers. Without access to affordable healthcare, people die. It's just that simple.

In addition, by the end of 2020 IUH Bloomington Hospital will have moved to a new location on the east side of Bloomington, taking the emergency department and outpatient specialists currently located in and around the hospital with them. As a result, evening and weekend urgent and emergency services and specialty care will be harder to access for our clients, who are largely downtown and on the west side. Further, there are many people in Monroe County that are insured but still medically underserved. These include people experiencing homelessness who do not feel comfortable at outpatient offices, where if one is late more than twice, one is terminated from the entire system of care!

Prompted by these developments, the VIM Board of Directors has been diligently exploring solutions for the future to not only increase our organizational capacity and improve the delivery of services, but also maintain our financial viability to serve low income, uninsured, and medically underserved populations for the long-term. A Federally Qualified Health Center (FQHC) is a type of non-profit outpatient clinic that we think offers a good solution.

In brief, an FQHC is a nonprofit organization that must meet certain federal criteria:

- Offers services to all persons, regardless of the person's ability to pay.
- Accepts all insurances and offers a sliding fee discount program.
- Serves a medically underserved area (MUA). Monroe County has MUA designation.
- Provides comprehensive primary care, dental, behavioral health, and a host of other required services.
- Offers **after hours urgent care and on-call phone triage**.
- Offers expanded hours for easy access around work schedules.

The primary difference between VIM and an FQHC is that an FQHC serves patients with and without insurance, adults and children. There is currently an FQHC in Spencer, IN. However, there are none in Monroe or other surrounding counties.

We are very hopeful that within the next 12 months VIM will become an FQHC. This service delivery model will be sustainable with the combination of insurance revenue and continued grants and philanthropic donations.

Thank you for your consideration!

**Jack Hopkins Social Services Funding Application for 2019
Volunteers in Medicine Project Budget**

Ensuring Access to Urgent Medical Care for Uninsured People

| Item | Cost |
|---|--------------------|
| Funding to offset approximately the Nurse Practitioner salary and fringe benefit costs to staff the Walk-In Clinic. | |
| • Salary (20 hrs * \$48/hr * 24 weeks) | \$23,040.00 |
| • Fringe (7.65% salary) | \$1,765.56 |
| TOTAL REQUESTED | \$24,800.00 |

**Volunteers In Medicine Clinic of Monroe County
2018 Year-End Financial Statement - Summary**

Revenue and Support:

| | |
|---|--------------------|
| Grants and Other Agency Gifts | \$910,511 |
| Regular Gifts/Donations (Including Endowment Gifts) | \$123,485 |
| Other Revenues (Includes Gain/Loss on Investments) | \$5,689 |
| Total Non-In-Kind Revenue and Support | \$1,039,685 |
| In-Kind Revenue and Support | \$170,122 |
| Total Revenue and Support | \$1,209,807 |
| Total Revenue & Support | \$1,209,807 |

Operating Expenses:

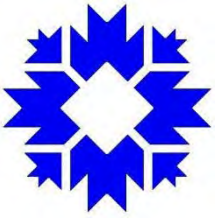
| | |
|---|--------------------|
| Salaries, Payroll, Benefits and Other Labor Related Expense | \$833,755 |
| Other Expense | \$277,357 |
| Total Non-In-Kind Operating Expenses | \$1,111,112 |
| In-Kind Operating Expense | \$170,122 |
| Total Operating Expense | \$1,281,234 |

Excess Revenue over Expense

(\$71,427)

2018 Year-End Profit and Loss Statement

| | |
|--|-----------------------|
| Income | |
| 6210 · IUHB Donations | \$267,654.00 |
| 6250 · Other Agency Gifts | \$300,098.89 |
| 6495 · Realized G/L | \$108,430.94 |
| 6490 · Unrealized G/L | (\$135,312.41) |
| 6450 · Investment Income | \$26,738.41 |
| 6550 · Gain/Loss Disp. of Assets | (\$7,259.25) |
| 6000 · Grants | \$342,758.65 |
| 6100 · Receipts - Pharmacy | \$1,086.58 |
| 6200 · Gifts / Donations | \$123,549.84 |
| 6400 · Miscellaneous Income | \$5,954.79 |
| 6325 · In-Kind - Rent Income | \$63,600.00 |
| 6350 · In-Kind - Medical Services Inc | \$101,397.27 |
| 6351 · In-Kind - Other Services Income | \$22,087.50 |
| Total Income | \$1,220,785.21 |
| Expense | |
| 7475 · Dental Expense | \$22,283.64 |
| 7775 · Insurance - Director/Officer | \$1,735.00 |
| 7950 · Computer Support | \$13,266.44 |
| 7750 · Insurance- Business Owners | \$346.00 |
| 9750 · Travel Expense | \$3,402.13 |
| 9800 · Volunteer Expense | \$251.03 |
| 7130 · Pension Expense | \$26,299.34 |
| 9660 · Fees/Dues/Subs | \$26,804.12 |
| 9650 · Professional Education | \$2,904.95 |
| 9550 · Management Fees | \$10,956.03 |
| 7000 · Payroll Expenses | \$637,313.68 |
| 7100 · FICA | \$47,989.23 |
| 7120 · Health Insurance | \$73,900.42 |
| 7200 · Contract Labor | \$39,012.50 |
| 7300 · Drugs & Medication | \$22,423.85 |
| 7400 · Medical Supplies | \$12,429.27 |
| 7450 · Medical Expense | \$97,132.82 |
| 7700 · Insurance - Liability | \$2,648.00 |
| 7800 · Insurance - Workers Comp | \$1,889.00 |
| 7900 · Office Supplies | \$3,806.99 |
| 8225 · Mileage Reimbursement Expense | \$632.28 |
| 8260 · Telephone Expenses | \$6,710.58 |
| 9000 · Postage/Printing | \$683.36 |
| 9200 · Repairs and Maintenance | \$173.95 |
| 9300 · Depreciation Expense | \$10,245.05 |
| 9400 · Marketing Expenses | \$1,695.38 |
| 9500 · Accounting Fees | \$37,420.61 |
| 9600 · Legal Fees | \$350.00 |
| 9700 · Miscellaneous Expenses | \$330.92 |
| 7205 · In-Kind - Medical Services Exp | \$101,397.27 |
| 7210 · In-Kind - Other Services Exp | \$22,087.50 |
| 8000 · In-Kind - Rent Expense | \$63,600.00 |
| Total Expense | \$1,292,121.34 |
| Revenue Over Expenses | (\$71,427.13) |



CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION

AGENCY CONTACT INFORMATION

Lead Agency Name: Wheeler Mission

Address: 215 S. Westplex Avenue

Phone: (812) 333-1905

E-Mail: stevegermani@wheelermission.org

Website: <https://wheelermission.org>

President of Board of Directors: Mike Rasor, Chairman

Name of Executive Director: Rick Alvis

Phone: (317) 635-3575

E-Mail: rickalvis@wheelermission.org

Name and Title of Person to Present Proposal to the Committee: Dana Jones, Bloomington Director

Phone: (812) 333-1905

E-Mail: danajones@wheelermission.org

Name of Grant Writer: Steve Germani

Phone: (574) 358-1270

E-Mail: stevegermani@wheelermission.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|---|---|--|
| 24 NOTE: 125 FT in Total (including Indy) | 3 NOTE: 33 PT in Total (including Indy) | 8,000 + NOTE: 236 in Bloomington |

AGENCY 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.

Wheeler’s mission is to ensure that every man, woman, and child experiencing homelessness in Bloomington has access to a safe environment where they can rest easily and confidently while working toward addressing the root causes of their homelessness.

PROJECT INFORMATION

Project Name: Increased safety and security for the most vulnerable

Total cost of project: \$18,226.48

Requested amount of JHSSF funding: \$18,226.48

Total number of City residents anticipated to be served by this project in 2019: 1,100

Total number of clients anticipated to be served by this project in 2019: 1,100

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Wheeler Mission is seeking an investment of \$18,226.48 to purchase security upgrades at both the Center for Men and Center for Women in Bloomington. Specifically, Wheeler will purchase and install new security cameras/equipment at both shelter locations, along with a remodeling of the front entrance at the Center for Women that includes a walk-through metal detector.

Wheeler hosted an average of 139 men, women, and children (all unduplicated) each night at the Bloomington shelter sites in February 2019. This is up from an average of 84 guests each night in February 2017 and 100 guests each night in February 2018. Despite these increases, and the increased security risks that come with serving more people, Wheeler staff are using security systems designed for residential use and require cumbersome efforts to replay video footage when needed. In fact, the security system at the Center for Men includes only three indoor cameras and is over ten years old; acquired and self-installed by Backstreet Missions.

Installing new equipment and remodeling these spaces will be like hiring additional staff as they look to ensure all guests are safe and secure. Coverage of high traffic areas throughout the facilities, and immediate access to footage captured in those areas, will reduce the number of incidents reported on these properties while, simultaneously, providing the peace of mind many guests are seeking as they look to focus on achieving their goals and addressing the root causes of their homelessness.

Address where project will be housed: The project will take place at both shelter locations in Bloomington. The Center for Men is located at 215 S. Westplex Avenue and The Center for Women is located at 400 S. Opportunity Lane.

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 to capital improvements to real estate and if you do not own the property at which the project 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.*

Not applicable. Wheeler Mission owns the properties where this project will take place.

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.

Not applicable. No forms of approval are required for this project.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

Not applicable. While Wheeler Mission works with a variety of other agencies in the community in serving the needs of those experiencing homelessness in Bloomington, this specific project is not collaborative.

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):* Wheeler Mission secured \$5,800 from the Sophia Travis Community Services Grant at the end of 2018 to begin installing security upgrades (walk through metal detector) at the Center for Men in Bloomington. While the purchases and acquisitions from that award are separate from this request, it was the first step toward the larger effort to create a safer, more secure environment for the increased number of guests seeking low-barrier shelter in Bloomington.

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds: Wheeler leadership plans to purchase and install the security equipment as soon as funds are available to do so. The vendors have already been identified and the installation is expected to be a straight-forward process. Completion of this project is expected by late summer, as all improvements need to be completed in advance of the temperatures dropping and demand for shelter increasing.

If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received: Not applicable.

FISCAL LEVERAGING *(100 words or less)*

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

Wheeler Mission developed a five-year strategic plan in 2018. One of the objectives generated from the plan is building a culture of safety and security. Executive leadership is currently in communication with a safety consultant to inspect, and potentially create action plans for, all Wheeler facilities. In the coming year, security upgrades will be installed at all shelter locations in both Bloomington and Indianapolis, with Wheeler leadership approving monies from existing investments to be used for this priority (as needed). No Wheeler shelter sites have a more pressing need for security upgrades than the existing sites in Bloomington.

FUNDING PRIORITIES -- RANKED

Due to limited funds, the Committee may recommend partial funding for a program. In the event the Committee is unable to meet your full request, **will you be able to proceed with partial funding?**
 Yes No

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

| | Item | Cost |
|-----------------|---|--------------------|
| Priority #1 | Security camera upgrades at Center for Men | \$4,444.93 |
| Priority #2 | Security camera upgrades at Center for Women | \$4,561.60 |
| Priority #3 | Remodel of Guest Service/Front Entrances at Center for Women | \$5,500.00 |
| Priority #4 | Walk Through Metal Detector for Center for Women | \$3,719.95 |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$18,226.48 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

Data from Monroe County Public Library's 2017 community survey indicates that the top three concerns for the local community are: 1) homelessness, 2) opioids/addictions, and 3) affordable housing. This correlates with data collected from the United Way's latest ALICE (Asset Limited, Income Constrained, Employed) report, where it was reported that 63% of Bloomington households are below the ALICE threshold; most of any city in the state of Indiana.

Wheeler Mission, along with many other social service agencies in the community, is absorbing the real impact of these reports. Data collected from the Homeless Management Information System (HMIS) shows that Wheeler Mission provided lodging to 104 men at the Center for Men, alone, as recent as a Thursday evening in mid-March. For the past year, it is more frequent than infrequent that there are over 100 men, women, and children seeking emergency shelter, food, and clothing at a Wheeler Mission site every night.

In providing these men, women, and children the most secure environment possible while they seek shelter and work toward independent living, it is critical that the security equipment utilized is congruent and in alignment with the usage of these facilities and the need in the community.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

Wheeler Mission seeks a one-time investment to purchase and install security equipment at both shelter locations and remodel the front entrance at the Center for Women, in an effort to provide the most safe and secure environment possible for the community's most vulnerable population.

Subsequent to the installation of the security upgrades/equipment, ongoing costs associated with the maintenance of the systems will be absorbed by the general operating budget of the agency. It is expected that the security systems being acquired and installed will be utilized for a minimum of five years, with hard drives and camera equipment being replaced (if deemed necessary) at that time.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Installing security upgrades at both shelter sites will result in more effectively providing an environment where the community's most vulnerable population feels safe and secure. Creating this type of environment allows for trusted relationships to be established, which can go a long way toward not only attracting those in the most need to these shelter sites, but also in addressing the unique needs of every individual served.

Additionally, the upgraded security capabilities will serve as a deterrent to conflict at both sites, easing a burden on local resources. With additional camera coverage, staff will be able to intervene and de-escalate potential conflict between guests. Furthermore, with the additional cameras outdoors, staff will be able to re-direct guests who may be wandering onto adjacent properties; reducing or preventing complaints from neighboring businesses. As more men, women, and children experience homelessness and seek shelter at these sites, neighboring businesses are more aware of the boundaries that exist between properties. In lieu of these businesses pursuing additional outdoor lighting or security cameras on their properties, Wheeler Mission will absorb these investments for the benefit of the community.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

The funding request is for security equipment/upgrades that will last a minimum of five years. Outcome indicators for the coming funding period include:

- Providing a safe and secure environment, where all areas of the shelter property are covered by quality security camera equipment, to an average of 140 men, women, and children every night.
- Reducing the number of incidents reported by guests where they are accused of, or accuse another guest of, violating personal property due to staff having access to immediate recall of video footage captured at locations throughout the properties, both indoors and outdoors.

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.

Wheeler Mission acquired Backstreet Missions in 2015. Upon becoming acquainted with the new community in which it was joining, Wheeler Mission made a concerted effort to lower shelter barriers and participate in the Bloomington Continuum of Care. Shelter services are offered throughout the year to anyone, regardless of religious preference, gender identification, race, and background. While Christian programs are always available at Wheeler Mission, no one receiving emergency shelter services is required to participate. Wheeler Mission will refer guests to other social service agencies in the community to ensure each guest receives the services best suited to meet their individualized needs. In addition to serving the homeless, Wheeler Mission recognizes the importance of contributing to the larger Bloomington community; including its residents, business owners, and students.

A byproduct of the efforts Wheeler Mission has made to understand and serve the needs of the most vulnerable population in Bloomington, is a significant increase in the number of men, women, and children seeking shelter at these sites. As noted in an earlier section of this request, Wheeler experienced a 40% increase in the number of guests served each night between February 2018 and February 2019. Furthermore, Wheeler has experienced growth in excess of 400% since the first full year of operating these shelter sites in 2016.

Despite this growth, Wheeler Mission is still operating in the same facilities. Providing safe spaces are critical to building relationships with the guests who seek shelter at these sites. While providing a nutritious meal, a hot shower, and a clean bed to every man, woman, and child in need is an important part of what Wheeler Mission provides, the goal is to understand every individual's unique circumstances while doing what is possible to put them on the road to independence/recovery. Trust and relationship are key variables in this equation and are much easier to establish when the guests feel safe and secure. More space and more security will go a long way in assisting Wheeler Mission's efforts to serve the needs of this population.

Remodeling the front entrance at the Center for Women is also a critical piece of the security puzzle. Currently, there are two separate entrances; one for the emergency shelter and one for those in long-term program. A wall separates these two entrances, preventing a guest services coordinator (staff) from seeing those who enter the shelter. While security cameras will certainly help, removing the wall and creating a secure space for the guest service coordinator will be an ideal long-term solution for this space.

It is worth noting that Wheeler Mission is currently exploring opportunities to expand the Center for Men. This information is not directly related to this request for support. However, it is worth noting within the context of this larger narrative about providing appropriate, and safe/secure spaces for those in the most need in this community.

WHEELER MISSION*Increased safety and security for the most vulnerable***PROJECT BUDGET***TOTAL COST*

| ITEM | COST |
|--|--------------------|
| Indoor and outdoor cameras and server installation at Center for Men | \$4,444.93 |
| Indoor and outdoor cameras and server installation at Center for Women | \$4,561.60 |
| Remodel of guest entrances at Center for Women | \$5,500 |
| Walk through metal detector | \$3,719.95 |
| TOTAL COST | \$18,226.48 |

NOTE: quotes/estimates included.



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 Work Phone: (317)469-6910

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| 03/20/19 | 85912841 | N/A | JW | EXPEDITED DELIVERY |

| Qty Ord | Item Description | SKU# MFR# | Item Price | Amount |
|---------|---|----------------------------|------------|----------|
| 1 | UBIQUITI UNIFI NVR-2TB/REG | UBUVCNVR2TB (UVCNVR2TB) | 339.99 | 339.99 |
| 9 | UBIQUITI UNIFI G3-PRO 1080P WEATHERPROOF IP CAM/REG | UBUVCG3PRO (UVCG3PRO) | 281.00 | 2,529.00 |
| 7 | UBIQUITI UNIFI VIDEO DOME CAMERA IR GEN-3/REG | UBUVCG3DOME (UVCG3DOME) | 130.00 | 910.00 |
| 1 | UBIQUITI 24 PORT EDGESWITCH GIGBIT 24v/POE 250w/REG | UBES24250W (ES24250W) | 375.15 | 375.15 |

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| <p>PLEASE NOTE: -----</p> <p>IMPORTANT NOTICE: B&H has begun collecting Indiana sales tax. If you are IN tax exempt, please contact our TAX Department. To update the status of your account, please email a completed tax exempt certificate to taxcertificates@bhphoto.com. The B&H Tax Department can be reached via phone at 212-502-6308.</p> <p>*****UPCOMING SCHEDULE CHANGE *****</p> <p>We Will be Closing on Wednesday, March 20th at 5pm We will remain closed on Thursday, March 21st We will reopen Friday March 22nd at 9am</p> <p>*****</p> <p>**** Please reference your quote number on all PO's ****</p> <p>Certain items may be enforced by vendor to sell at the</p> | | | | |

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| 03/20/19 | 85912841 | N/A | Slsm | EXPEDITED DELIVERY |

| Qty Ord | Item Description | SKU# MFR# | Item Price | Amount |
|---------|---|--------------|------------|--------|
| | vendor-imposed price posted at the time of order. | | | |

| | | |
|---|-----------------|----------------------------|
| Payment Type - NO PAYMENT TYPE SELECTED | - Amount | Sub-Total: 4,154.14 |
| | | Shipping: Free STND |
| | | Tax: 290.79 |
| | | Total: 538 4,444.93 |

BNH_quote

Rice Maintenance

264 Vandalia Ave

Spencer, IN. 47460

812-606-0679

Rice.brian7@gmail.com

QUOTE FOR PROJECT—WO#

400 S Opportunity Ln.

3/27/2019

Remodel office area

Total labor costs--\$4000.00

Total materials--\$1500.00

Total project cost--\$5500.00

Project includes all aspects of remodel as discussed.

- 1-3'Tx4'W sliding window
- 2-Dutch doors; hand made

If you have any questions, please let me know.

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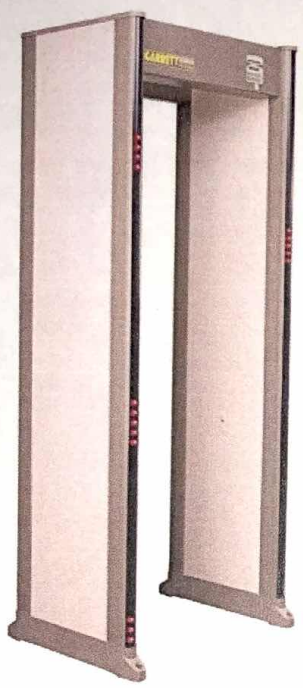
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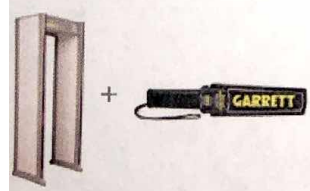
\$3,997.00

+ Free Shipping
Sold by: **Texas Premium Detectors**

New (10) from \$3,719.95 & FREE shipping.

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Total price: **\$3,854.70**

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 Work Phone: (317)469-6910

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| 03/20/19 | 85912841 | N/A | JW | EXPEDITED DELIVERY |

| Qty Ord | Item Description | SKU# MFR# | Item Price | Amount |
|---------|---|----------------------------|------------|----------|
| 1 | UBIQUITI UNIFI NVR-2TB/REG | UBUVCNVR2TB (UVCNVR2TB) | 339.99 | 339.99 |
| 8 | UBIQUITI UNIFI G3-PRO 1080P WEATHERPROOF IP CAM/REG | UBUVCG3PRO (UVCG3PRO) | 281.00 | 2,248.00 |
| 10 | UBIQUITI UNIFI VIDEO DOME CAMERA IR GEN-3/REG | UBUVCG3DOME (UVCG3DOME) | 130.00 | 1,300.00 |
| 1 | UBIQUITI 24 PORT EDGESWITCH GIGBIT 24v/POE 250w/REG | UBES24250W (ES24250W) | 375.19 | 375.19 |

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| Qty Ord | Item Description | SKU# MFR# | Item Price | Amount |
|---|------------------|--------------|------------|--------|
| <p>PLEASE NOTE: -----</p> <p>IMPORTANT NOTICE: B&H has begun collecting Indiana sales tax. If you are IN tax exempt, please contact our TAX Department. To update the status of your account, please email a completed tax exempt certificate to taxcertificates@bhphoto.com. The B&H Tax Department can be reached via phone at 212-502-6308.</p> <p>*****UPCOMING SCHEDULE CHANGE *****</p> <p>We Will be Closing on Wednesday, March 20th at 5pm We will remain closed on Thursday, March 21st We will reopen Friday March 22nd at 9am</p> <p>*****</p> <p>**** Please reference your quote number on all PO's ****</p> <p>Certain items may be enforced by vendor to sell at the</p> | | | | |

Continued on Next Page ...



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Federal ID#: 13-2768071

Quote No.: 795963940

| Date | Customer Code | Terms | Salesperson | Ship Via |
|----------|---------------|-------|-------------|--------------------|
| 03/20/19 | 85912841 | N/A | Slsm | EXPEDITED DELIVERY |

| Qty Ord | Item Description | SKU# MFR# | Item Price | Amount |
|---------|---|--------------|------------|--------|
| | vendor-imposed price posted at the time of order. | | | |

| | | |
|---|-----------------|----------------------------|
| Payment Type - NO PAYMENT TYPE SELECTED | - Amount | Sub-Total: 4,263.18 |
| | | Shipping: Free STND |
| | | Tax: 298.42 |
| | | Total: 543 4,561.60 |

BNH_quote



WHEELER MISSION MINISTRIES, INC.
AND SUBSIDIARY
CONSOLIDATED FINANCIAL STATEMENTS
AND
SUPPLEMENTARY INFORMATION
MAY 31, 2018 AND 2017

CPAs / ADVISORS



WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY

TABLE OF CONTENTS
MAY 31, 2018 AND 2017

| | Page |
|--|----------|
| Report of Independent Auditors | 1 |
| Consolidated Financial Statements | |
| Consolidated Statements of Financial Position | 3 |
| Consolidated Statements of Activities | 4 |
| Consolidated Statements of Functional Expenses..... | 6 |
| Consolidated Statements of Cash Flows | 8 |
| Notes to Consolidated Financial Statements | 9 |
| Supplementary Information | |
| Consolidated Statement of Program Services Expenses..... | 26 |



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 Subsidiary
Indianapolis, Indiana

We have audited the accompanying consolidated financial statements of Wheeler Mission Ministries, Inc. and Subsidiary (hereby collectively referred to as the Ministry), which comprise the consolidated statements of financial position as of May 31, 2018 and 2017, 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.

Management's Responsibility for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements 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 entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

**REPORT OF INDEPENDENT AUDITORS
(Continued)**

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

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, 2018 and 2017, and the 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.

Report on Supplementary Information

Our audits were conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The consolidated statement of program services 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
October 24, 2018

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY

CONSOLIDATED STATEMENTS OF FINANCIAL POSITION
MAY 31, 2018 AND 2017

ASSETS

| | <u>2018</u> | <u>2017</u> |
|---|----------------------|----------------------|
| Cash | \$ 501,135 | \$ 1,104,159 |
| Investments - capital and general operating | 3,975,182 | 3,207,823 |
| Accounts receivable | 140,874 | 62,447 |
| Contributions receivable | 23,900 | 179,200 |
| Inventory | 193,976 | 181,926 |
| Prepaid and other assets | 15,486 | 19,958 |
| Property and equipment, net | 15,836,240 | 15,292,472 |
| Endowment | | |
| Investments | 2,224,997 | 1,793,458 |
| Cash | -0- | 125,000 |
| Investments - other | | |
| Charitable gift annuities | 169,971 | 161,069 |
| Charitable remainder trust | <u>1,376,980</u> | <u>1,154,257</u> |
| | <u>\$ 24,458,741</u> | <u>\$ 23,281,769</u> |

LIABILITIES AND NET ASSETS

| | | |
|---------------------------------------|----------------------|----------------------|
| Liabilities | | |
| Accounts payable | \$ 301,160 | \$ 299,642 |
| Accrued payroll and other liabilities | 237,358 | 351,086 |
| Charitable gift annuities payable | 64,178 | 83,277 |
| Charitable remainder trust payable | <u>861,631</u> | <u>731,013</u> |
| Total liabilities | 1,464,327 | 1,465,018 |
| Net assets | | |
| Unrestricted | | |
| Undesignated | 19,121,008 | 18,668,544 |
| Board designated - general | 500,000 | 500,000 |
| Board designated - endowment | <u>546,024</u> | <u>494,701</u> |
| | 20,167,032 | 19,663,245 |
| Temporarily restricted | 1,523,982 | 850,106 |
| Permanently restricted | <u>1,303,400</u> | <u>1,303,400</u> |
| Total net assets | <u>22,994,414</u> | <u>21,816,751</u> |
| | <u>\$ 24,458,741</u> | <u>\$ 23,281,769</u> |

See accompanying notes to consolidated financial statements.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY**CONSOLIDATED STATEMENT OF ACTIVITIES**

YEAR ENDED MAY 31, 2018

(With Comparative Total for the Year Ended May 31, 2017)

| | 2018 | | | Total | 2017 Total |
|---|----------------------|---------------------------|---------------------------|----------------------|----------------------|
| | Unrestricted | Temporarily Restricted | Permanently Restricted | | |
| Support and revenue | | | | | |
| Contributions | \$ 7,632,505 | \$ 1,563,163 | \$ -0- | \$ 9,195,668 | \$ 8,150,486 |
| Contributions - wills and estates | 760,765 | -0- | -0- | 760,765 | 428,644 |
| Gifts-in-kind | 1,096,334 | -0- | -0- | 1,096,334 | 1,048,809 |
| Program service revenue | 1,726,130 | -0- | -0- | 1,726,130 | 1,388,919 |
| Change in value of annuity and trust liabilities | (833) | (224,249) | -0- | (225,082) | (153,344) |
| Investment return | | | | | |
| Capital and general operating, net | 212,170 | -0- | -0- | 212,170 | 182,550 |
| Endowment and other, net | 67,978 | 246,570 | -0- | 314,548 | 318,539 |
| Other | 31,398 | -0- | -0- | 31,398 | 37,557 |
| Net assets released from restrictions | 928,008 | (928,008) | -0- | -0- | -0- |
| | <u>12,454,455</u> | <u>657,476</u> | <u>-0-</u> | <u>13,111,931</u> | <u>11,402,160</u> |
| Special events | | | | | |
| Registration fees and other support | 975,355 | 16,400 | -0- | 991,755 | 874,666 |
| Gift-in-kind support | 1,436,441 | -0- | -0- | 1,436,441 | 1,195,988 |
| Direct expenses of events | (361,008) | -0- | -0- | (361,008) | (320,502) |
| Gift-in-kind expenses | (1,436,441) | -0- | -0- | (1,436,441) | (1,195,988) |
| | <u>614,347</u> | <u>16,400</u> | <u>-0-</u> | <u>630,747</u> | <u>554,164</u> |
| Total support and revenue | 13,068,802 | 673,876 | -0- | 13,742,678 | 11,956,324 |
| Expenses | | | | | |
| Program services | | | | | |
| Men's residential center | 995,055 | -0- | -0- | 995,055 | 897,901 |
| Shelter for men | 1,691,405 | -0- | -0- | 1,691,405 | 1,491,809 |
| Center for women and children | 1,191,198 | -0- | -0- | 1,191,198 | 1,168,288 |
| Camp Hunt | 930,619 | -0- | -0- | 930,619 | 885,202 |
| Industry | 1,171,735 | -0- | -0- | 1,171,735 | 853,220 |
| Edwards residence | 142,195 | -0- | -0- | 142,195 | 131,508 |
| Thrift shop | 509,741 | -0- | -0- | 509,741 | 487,552 |
| Ministry services | 884,794 | -0- | -0- | 884,794 | 848,357 |
| Center for men (Bloomington) | 604,025 | -0- | -0- | 604,025 | 537,547 |
| Center for women and children (Bloomington) | 355,308 | -0- | -0- | 355,308 | 321,823 |
| Food services | 602,936 | -0- | -0- | 602,936 | 457,587 |
| Restored creations | 63,658 | -0- | -0- | 63,658 | 42,209 |
| | <u>9,142,669</u> | <u>-0-</u> | <u>-0-</u> | <u>9,142,669</u> | <u>8,123,003</u> |
| Supporting activities | | | | | |
| Management and general | 640,133 | -0- | -0- | 640,133 | 413,660 |
| Fundraising and development | 2,782,213 | -0- | -0- | 2,782,213 | 2,569,639 |
| | <u>3,422,346</u> | <u>-0-</u> | <u>-0-</u> | <u>3,422,346</u> | <u>2,983,299</u> |
| Total expenses | 12,565,015 | -0- | -0- | 12,565,015 | 11,106,302 |
| Change in net assets | 503,787 | 673,876 | -0- | 1,177,663 | 850,022 |
| Net assets, beginning of year | 19,663,245 | 850,106 | 1,303,400 | 21,816,751 | 20,966,729 |
| Net assets, end of year | <u>\$ 20,167,032</u> | <u>\$ 1,523,982</u> | <u>\$ 1,303,400</u> | <u>\$ 22,994,414</u> | <u>\$ 21,816,751</u> |

See accompanying notes to consolidated financial statements.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY**CONSOLIDATED STATEMENT OF ACTIVITIES
YEAR ENDED MAY 31, 2017**

| | Unrestricted | Temporarily Restricted | Permanently Restricted | Total |
|---|----------------------|---------------------------|---------------------------|----------------------|
| Support and revenue | | | | |
| Contributions | \$ 6,789,711 | \$ 1,023,342 | \$ 337,433 | \$ 8,150,486 |
| Contributions - wills and estates | 428,644 | -0- | -0- | 428,644 |
| Gifts-in-kind | 1,048,809 | -0- | -0- | 1,048,809 |
| Program service revenue | 1,388,919 | -0- | -0- | 1,388,919 |
| Change in value of annuity and trust liabilities | (766) | (152,578) | -0- | (153,344) |
| Investment return | | | | |
| Capital and general operating, net | 182,550 | -0- | -0- | 182,550 |
| Endowment and other, net | 73,540 | 244,999 | -0- | 318,539 |
| Other | 37,557 | -0- | -0- | 37,557 |
| Net assets released from restrictions | 1,463,913 | (1,463,913) | -0- | -0- |
| | <u>11,412,877</u> | <u>(348,150)</u> | <u>337,433</u> | <u>11,402,160</u> |
| Special events | | | | |
| Registration fees and other support | 791,966 | 82,700 | -0- | 874,666 |
| Gift-in-kind support | 1,195,988 | -0- | -0- | 1,195,988 |
| Direct expenses of events | (320,502) | -0- | -0- | (320,502) |
| Gift-in-kind expenses | (1,195,988) | -0- | -0- | (1,195,988) |
| | <u>471,464</u> | <u>82,700</u> | <u>-0-</u> | <u>554,164</u> |
| Total support and revenue | 11,884,341 | (265,450) | 337,433 | 11,956,324 |
| Expenses | | | | |
| Program services | | | | |
| Men's residential center | 897,901 | -0- | -0- | 897,901 |
| Shelter for men | 1,491,809 | -0- | -0- | 1,491,809 |
| Center for women and children | 1,168,288 | -0- | -0- | 1,168,288 |
| Camp Hunt | 885,202 | -0- | -0- | 885,202 |
| Industry | 853,220 | -0- | -0- | 853,220 |
| Edwards residence | 131,508 | -0- | -0- | 131,508 |
| Thrift shop | 487,552 | -0- | -0- | 487,552 |
| Ministry services | 848,357 | -0- | -0- | 848,357 |
| Center for men (Bloomington) | 537,547 | -0- | -0- | 537,547 |
| Center for women and children (Bloomington) | 321,823 | -0- | -0- | 321,823 |
| Food services | 457,587 | -0- | -0- | 457,587 |
| Restored creations | 42,209 | -0- | -0- | 42,209 |
| | <u>8,123,003</u> | <u>-0-</u> | <u>-0-</u> | <u>8,123,003</u> |
| Supporting activities | | | | |
| Management and general | 413,660 | -0- | -0- | 413,660 |
| Fundraising and development | 2,569,639 | -0- | -0- | 2,569,639 |
| | <u>2,983,299</u> | <u>-0-</u> | <u>-0-</u> | <u>2,983,299</u> |
| Total expenses | 11,106,302 | -0- | -0- | 11,106,302 |
| Change in net assets | 778,039 | (265,450) | 337,433 | 850,022 |
| Net assets, beginning of year | 18,885,206 | 1,115,556 | 965,967 | 20,966,729 |
| Net assets, end of year | \$ 19,663,245 | \$ 850,106 | \$ 1,303,400 | \$ 21,816,751 |

See accompanying notes to consolidated financial statements.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY

CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES
 YEAR ENDED MAY 31, 2018
 (With Comparative Total for the Year Ended May 31, 2017)

| | 2018 | | | | | 2017 Total |
|---|---------------------|------------------------------|-----------------------------------|-----------------------------------|----------------------|----------------------|
| | Program Services | Supporting Activities | | | Total | |
| | | Management and General | Fundraising and Development | Total Supporting Activities | | |
| Salaries and benefits | \$ 4,655,896 | \$ 214,508 | \$ 923,636 | \$ 1,138,144 | \$ 5,794,040 | \$ 5,205,399 |
| Gift-in-kind expenses | 1,089,907 | -0- | 1,436,441 | 1,436,441 | 2,526,348 | 2,243,767 |
| Public relations and direct mailing | 186,879 | 4,930 | 1,474,518 | 1,479,448 | 1,666,327 | 1,611,766 |
| Direct expenses of events | -0- | -0- | 361,008 | 361,008 | 361,008 | 320,502 |
| Telephone and utilities | 614,321 | 26,884 | 3,115 | 29,999 | 644,320 | 589,106 |
| Depreciation expense | 620,261 | 66,407 | -0- | 66,407 | 686,668 | 633,260 |
| Postage | 1,008 | 8,717 | 39,636 | 48,353 | 49,361 | 45,147 |
| Maintenance | 273,798 | 27,069 | 26,360 | 53,429 | 327,227 | 269,777 |
| Insurance | 149,333 | 10,928 | 58,082 | 69,010 | 218,343 | 195,299 |
| Food | 149,954 | -0- | -0- | -0- | 149,954 | 137,251 |
| Equipment repair and maintenance | 136,431 | 6,375 | 19,638 | 26,013 | 162,444 | 181,901 |
| Cleaning supplies | 60,443 | 103 | -0- | 103 | 60,546 | 54,061 |
| Fuel and oil | 66,013 | 1,080 | 3,154 | 4,234 | 70,247 | 41,998 |
| Professional services | 42,547 | 210,490 | 48,798 | 259,288 | 301,835 | 130,126 |
| Program materials | 60,858 | 1,429 | 3,911 | 5,340 | 66,198 | 56,068 |
| Office supplies | 16,273 | 3,565 | 2,486 | 6,051 | 22,324 | 19,757 |
| Staff travel and conferences | 33,564 | 6,836 | 17,951 | 24,787 | 58,351 | 46,301 |
| Industry and supplies | 884,115 | -0- | -0- | -0- | 884,115 | 625,353 |
| Grants and scholarships | 56,700 | -0- | -0- | -0- | 56,700 | 39,990 |
| Membership fees | 9,971 | 1,384 | 3,613 | 4,997 | 14,968 | 13,429 |
| Sales and property tax | -0- | 105 | -0- | 105 | 105 | 2,119 |
| Capital campaign expenses | -0- | -0- | 82,468 | 82,468 | 82,468 | 5,000 |
| Lockbox and bank fees | 9,064 | 49,300 | 74,772 | 124,072 | 133,136 | 130,866 |
| Miscellaneous | 25,333 | 23 | 75 | 98 | 25,431 | 24,549 |
| Total expenses | 9,142,669 | 640,133 | 4,579,662 | 5,219,795 | 14,362,464 | 12,622,792 |
| Less expenses netted with support and revenues on the statement of activities | -0- | -0- | (1,797,449) | (1,797,449) | (1,797,449) | (1,516,490) |
| Total expenses reported on the statement of activities | <u>\$ 9,142,669</u> | <u>\$ 640,133</u> | <u>\$ 2,782,213</u> | <u>\$ 3,422,346</u> | <u>\$ 12,565,015</u> | <u>\$ 11,106,302</u> |

See accompanying notes to consolidated financial statements.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY

CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES
YEAR ENDED MAY 31, 2017

| | Program Services | Supporting Activities | | | Total |
|---|---------------------|------------------------------|-----------------------------------|-----------------------------------|----------------------|
| | | Management and General | Fundraising and Development | Total Supporting Activities | |
| Salaries and benefits | \$ 4,147,340 | \$ 198,004 | \$ 860,055 | \$ 1,058,059 | \$ 5,205,399 |
| Gift-in-kind expenses | 1,047,779 | -0- | 1,195,988 | 1,195,988 | 2,243,767 |
| Public relations and direct mailing | 148,479 | 1,698 | 1,461,589 | 1,463,287 | 1,611,766 |
| Direct expenses of events | -0- | -0- | 320,502 | 320,502 | 320,502 |
| Telephone and utilities | 559,554 | 27,374 | 2,178 | 29,552 | 589,106 |
| Depreciation expense | 572,598 | 60,662 | -0- | 60,662 | 633,260 |
| Postage | 720 | 7,941 | 36,486 | 44,427 | 45,147 |
| Maintenance | 235,333 | 15,094 | 19,350 | 34,444 | 269,777 |
| Insurance | 134,141 | 9,304 | 51,854 | 61,158 | 195,299 |
| Food | 137,251 | -0- | -0- | -0- | 137,251 |
| Equipment repair and maintenance | 152,038 | 12,543 | 17,320 | 29,863 | 181,901 |
| Cleaning supplies | 52,577 | 1,484 | -0- | 1,484 | 54,061 |
| Fuel and oil | 38,269 | 1,079 | 2,650 | 3,729 | 41,998 |
| Professional services | 94,050 | 27,088 | 8,988 | 36,076 | 130,126 |
| Program materials | 51,834 | -0- | 4,234 | 4,234 | 56,068 |
| Office supplies | 13,037 | 3,089 | 3,631 | 6,720 | 19,757 |
| Staff travel and conferences | 31,300 | 3,848 | 11,153 | 15,001 | 46,301 |
| Industry and supplies | 625,353 | -0- | -0- | -0- | 625,353 |
| Grants and scholarships | 39,990 | -0- | -0- | -0- | 39,990 |
| Membership fees | 9,149 | 1,028 | 3,252 | 4,280 | 13,429 |
| Sales and property tax | -0- | 2,119 | -0- | 2,119 | 2,119 |
| Capital campaign expenses | -0- | -0- | 5,000 | 5,000 | 5,000 |
| Lockbox and bank fees | 7,772 | 41,210 | 81,884 | 123,094 | 130,866 |
| Miscellaneous | 24,439 | 95 | 15 | 110 | 24,549 |
| Total expenses | 8,123,003 | 413,660 | 4,086,129 | 4,499,789 | 12,622,792 |
| Less expenses netted with support and revenues on the statement of activities | -0- | -0- | (1,516,490) | (1,516,490) | (1,516,490) |
| Total expenses reported on the statement of activities | <u>\$ 8,123,003</u> | <u>\$ 413,660</u> | <u>\$ 2,569,639</u> | <u>\$ 2,983,299</u> | <u>\$ 11,106,302</u> |

See accompanying notes to consolidated financial statements.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY

CONSOLIDATED STATEMENT OF CASH FLOWS
YEARS ENDED MAY 31, 2018 AND 2017

| | 2018 | 2017 |
|---|-------------------|---------------------|
| Operating activities | | |
| Change in net assets | \$ 1,177,663 | \$ 850,022 |
| Adjustments to reconcile change in net assets to net cash flows from operating activities | | |
| Depreciation | 686,668 | 633,260 |
| Gain on sale of property and equipment | (11,694) | (1,565) |
| Realized and unrealized gains on investments, net | (282,880) | (365,163) |
| Change in value of annuity and trust liabilities | 225,082 | 153,344 |
| Proceeds from contributions restricted for purchase and renovation of buildings | (780,549) | (133,427) |
| Proceeds from contributions restricted for investment in endowment | (125,000) | (462,433) |
| Contribution related to release of charitable gift annuity liability | (12,180) | -0- |
| Changes in assets and liabilities | | |
| Accounts receivable | (78,427) | 16,772 |
| Contributions receivable | 155,300 | 233,682 |
| Other assets | (7,578) | (45,762) |
| Accounts payable | 60,462 | (14,011) |
| Accrued payroll and other liabilities | (113,728) | 44,789 |
| Net cash flows from operating activities | 893,139 | 909,508 |
| Investing activities | | |
| Capital expenditures | (1,291,833) | (859,007) |
| Proceeds from sale of property and equipment | 14,147 | 17,650 |
| Cash received for investment in endowment | -0- | (125,000) |
| Purchases of investments | (2,020,780) | (1,178,737) |
| Proceeds from sale of investments | 998,137 | 709,907 |
| Net cash flows from investing activities | (2,300,329) | (1,435,187) |
| Financing activities | | |
| Proceeds from contributions restricted for purchase and renovation of buildings | 780,549 | 133,427 |
| Proceeds from contributions restricted for investment in endowment | 125,000 | 462,433 |
| Annuities and trusts payments | (101,383) | (89,454) |
| Net cash flows from financing activities | 804,166 | 506,406 |
| Net change in cash | (603,024) | (19,273) |
| Cash, beginning of year | <u>1,104,159</u> | <u>1,123,432</u> |
| Cash, end of year | <u>\$ 501,135</u> | <u>\$ 1,104,159</u> |
| Supplemental disclosure of noncash investing activities | | |
| Change in accounts payable related to capital expenditures | \$ (58,944) | \$ 110,117 |
| Cash held in endowment used for purchase of investments | \$ 125,000 | \$ -0- |

See accompanying notes to consolidated financial statements.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

1. NATURE OF ACTIVITIES

The accompanying consolidated financial statements include the accounts of Wheeler Mission Ministries, Inc. and its wholly owned subsidiary, Wheeler East Street Holdings, Inc. (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 the homeless and those in need. The vision of the Ministry is to see every man, woman, and child served 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 (orientation at Men's Residential Center) and to women at the Edwards Residence (orientation at Center for Women and Children).

In addition to the seven service centers, WMM owns and operates a thrift shop on the south side of Indianapolis 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.

WMM is a member of the Association of Gospel Rescue Missions, 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 one property that WMM utilizes to operate various programs. ESH received its initial start-up funding from WMM. WMM also provides ongoing operational support to ESH.

During the year ended May 31, 2017, WMM formed Drumstick Dash, LLC (DD) a single member limited liability company. DD was formed to house the activities of the annual Drumstick Dash event. DD had no assets or liabilities as of May 31, 2018 and 2017, and incurred no income or expense during the years then ended.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIESBasis 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 restrictions on use that are placed by the Ministry's donors, as follows:

Unrestricted net assets – Unrestricted net assets are resources available to support operations. The only limits on the use of unrestricted net assets 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.

Temporarily restricted net assets – Temporarily restricted net assets 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. In addition, earnings on donor restricted endowment funds are classified as temporarily restricted until those amounts are appropriated for expenditure.

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 temporarily restricted to unrestricted net assets. Net assets restricted for acquisition of property and equipment (or the contribution of those assets directly) are reported as temporarily restricted until the donated or acquired assets are placed in service, unless the donor provides more specific directions about the period of its use.

Permanently restricted net assets – Permanently restricted 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.

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 SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

Cash

For purposes of the consolidated statement of cash flows, cash excludes cash held by various fund managers and included in investments, and also excludes endowment cash.

Accounts Receivable

Accounts receivable 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 no allowance for doubtful accounts receivable is necessary at May 31, 2018 and 2017.

Contributions Receivable

Contributions receivable of \$23,900 and \$179,200 at May 31, 2018 and 2017, respectively, consist of amounts that have been unconditionally promised to the Ministry. All contributions receivable are due within one year of the consolidated statement of financial position date.

Management estimates an allowance for uncollectible contributions receivable based on current economic conditions, historical trends, and current and past experience with their donor base. Management has determined that no allowance for uncollectible contributions is necessary at May 31, 2018 and 2017.

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 at one-twelfth of the current year's sales, which approximates fair value.

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 of buildings and equipment are recorded as support at their estimated fair value at the date of the gift. Such gifts are reported as unrestricted support unless the donor has restricted the donated asset to a specific purpose or stipulated how long those long-lived assets must be used. Absent explicit donor restrictions on use or how long the donated assets must be maintained, the Ministry reports expirations of donor restrictions when the donated or acquired

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

assets are placed in service. The Ministry reclassifies temporarily restricted net assets to unrestricted net assets 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 |

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, 2018 and 2017, 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. Investment return is recognized as unrestricted or temporarily restricted revenues based on the existence or absence of donor-imposed restrictions.

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 temporarily restricted contributions in the period the gift is received. There were no such contributions during the years ended May 31, 2018 and 2017. During the year ended May 31, 2018, liability for future payments under one of the charitable gift annuities administered ceased upon the death of the annuity's beneficiary. A contribution for the release of the liability related to the present value of estimated future payments of \$12,180 was recognized as contribution income during the year then ended.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

Assets held in trust total \$169,971 and \$161,069 at May 31, 2018 and 2017, 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 \$64,178 and \$83,277 at May 31, 2018 and 2017, respectively. The fair value (Level 2 in the fair value hierarchy – see Note 4) 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 3.2% (2.6% at May 31, 2017) 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 temporarily restricted contributions in the period the contributions are made to the trust. During the years ended May 31, 2018 and 2017, contributions in the amount of \$200,000 and \$100,000, respectively, were made to the charitable remainder trust.

Assets held in trust total \$1,376,980 and \$1,154,257 at May 31, 2018 and 2017, 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 \$861,631 and \$731,013 at May 31, 2018 and 2017, respectively. The fair value (Level 2 in the fair value hierarchy – see Note 4) of the estimated future payments is calculated using a discount rate of 3.2% (2.6% at May 31, 2017) and the applicable mortality tables.

Support and Revenue Recognition

Contributions, which include unconditional promises to give, are recognized in the period the contribution is received, the promise is made, or ownership of other assets is transferred to the Ministry.

Support that is not restricted by the donor is reported as an increase in unrestricted net assets. All donor-restricted support is reported as an increase in temporarily or permanently restricted net assets. When a donor restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the consolidated statement of activities as net assets released from restrictions.

Program service revenues are recorded as revenue in the year to which they relate.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

Gifts-In-Kind Contributions

Donated goods used in the operations of the Ministry are recorded at their estimated "thrift store" fair market value on the date the gifts are received. Donated goods that are used for special events are recorded at their estimated fair market value on the date the gifts are received, which includes discounting their value based on quantities donated. All other donated goods received by the Ministry are channeled to the thrift store and recorded as revenue when sold. Donated goods contributed to the Ministry in excess of requirements for the Ministry's internal programs are distributed to other relief organizations within the Indianapolis area.

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. Although the method used was appropriate, other methods could produce different results.

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 related state law.

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, 2018 and 2017, 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, 2017. 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).

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017Subsequent 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 October 24, 2018, which is the date the consolidated financial statements were available to be issued.

3. PROPERTY AND EQUIPMENT

Property and equipment consist of the following at May 31:

| | <u>2018</u> | <u>2017</u> |
|----------------------------|----------------------|----------------------|
| Land | \$ 1,947,970 | \$ 1,947,970 |
| Buildings and improvements | 19,214,022 | 17,327,614 |
| Equipment | 2,303,197 | 1,948,037 |
| Vehicles | 510,510 | 620,427 |
| Construction in process | <u>136,686</u> | <u>1,224,310</u> |
| | 24,112,385 | 23,068,358 |
| Accumulated depreciation | <u>(8,276,145)</u> | <u>(7,775,886)</u> |
| | <u>\$ 15,836,240</u> | <u>\$ 15,292,472</u> |

The Ministry has entered into several contractual agreements as of May 31, 2018 relating to construction at certain locations. The total contractual commitment related to the executed but uncompleted contracts amounts to approximately \$800,000 at May 31, 2018.

Land and buildings aggregating a total cost of \$5,894,082 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 FHLBI grants aggregating \$375,000 and \$500,000 end during March 2023 and January 2031, respectively.

4. 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

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

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 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, 2018 and 2017.

- *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.

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 SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

The following tables set forth the Ministry's investment portfolio as of May 31:

| | 2018 | | | | |
|--------------------------|-------------------------------------|---------------------|-------------------|---------------------|---------------------|
| | Capital and General Operating | Endowment | Other | | Total |
| | | | Annuity | Trust | |
| LEVEL 1 | | | | | |
| Mutual funds | | | | | |
| Equity | | | | | |
| Large cap growth | \$ -0- | \$ 391,259 | \$ 29,855 | \$ 241,852 | \$ 662,966 |
| Large cap value | -0- | 439,474 | 33,631 | 272,777 | 745,882 |
| Large cap blended | -0- | 310,134 | 23,872 | 193,372 | 527,378 |
| Midcap growth | -0- | 88,277 | 6,732 | 54,560 | 149,569 |
| Midcap value | -0- | 44,280 | 3,391 | 27,466 | 75,137 |
| Midcap blended | -0- | 152,214 | 11,586 | 93,871 | 257,671 |
| Small cap growth | -0- | 134,557 | 10,258 | 83,109 | 227,924 |
| Small cap value | -0- | 44,174 | 3,399 | 27,539 | 75,112 |
| International | -0- | 166,890 | 12,642 | 102,413 | 281,945 |
| Fixed income | | | | | |
| Ultrashort bond | 1,702,143 | -0- | -0- | -0- | 1,702,143 |
| Inflation-protected bond | -0- | 224,181 | 17,342 | 140,481 | 382,004 |
| Other bond | 101,680 | 225,469 | 17,263 | 139,508 | 483,920 |
| Exchange traded funds | | | | | |
| Large cap growth | 215,835 | -0- | -0- | -0- | 215,835 |
| Large cap value | 408,694 | -0- | -0- | -0- | 408,694 |
| Large cap blended | 384,491 | -0- | -0- | -0- | 384,491 |
| Midcap blended | 162,822 | -0- | -0- | -0- | 162,822 |
| Small cap blended | 167,854 | -0- | -0- | -0- | 167,854 |
| Fixed income | 283,667 | -0- | -0- | -0- | 283,667 |
| International | 296,319 | -0- | -0- | -0- | 296,319 |
| Total fair value | 3,723,505 | 2,220,909 | 169,971 | 1,376,948 | 7,491,333 |
| Cash | 251,677 | 4,088 | -0- | 32 | 255,797 |
| Total investments | <u>\$ 3,975,182</u> | <u>\$ 2,224,997</u> | <u>\$ 169,971</u> | <u>\$ 1,376,980</u> | <u>\$ 7,747,130</u> |

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

| | 2017 | | | | |
|--------------------------|------------------------|--------------|------------|--------------|--------------|
| | Capital and General | Endowment | Other | | Total |
| | Operating | | Annuity | Trust | |
| LEVEL 1 | | | | | |
| Mutual funds | | | | | |
| Equity | | | | | |
| Large cap growth | \$ -0- | \$ 250,287 | \$ 33,644 | \$ 239,132 | \$ 523,063 |
| Large cap value | -0- | 243,431 | 32,113 | 228,236 | 503,780 |
| Large cap blended | -0- | 227,403 | 30,807 | 221,950 | 480,160 |
| Midcap growth | -0- | 96,041 | 13,582 | 95,023 | 204,646 |
| Midcap blended | -0- | 50,749 | 7,039 | 49,326 | 107,114 |
| Small cap growth | -0- | 75,260 | 10,536 | 71,065 | 156,861 |
| Small cap value | -0- | 24,054 | 3,402 | 21,883 | 49,339 |
| Fixed income | | | | | |
| Ultrashort bond | 1,512,245 | 130,080 | 15,476 | -0- | 1,657,801 |
| Inflation-protected bond | -0- | 110,557 | -0- | 113,914 | 224,471 |
| Other bond | | 103,964 | 14,470 | 113,728 | 232,162 |
| Exchange traded funds | | | | | |
| Large cap growth | 307,136 | 26,420 | -0- | -0- | 333,556 |
| Large cap value | 311,147 | 26,764 | -0- | -0- | 337,911 |
| Large cap blended | 296,902 | 25,539 | -0- | -0- | 322,441 |
| Midcap blended | 139,007 | 11,956 | -0- | -0- | 150,963 |
| Small cap blended | 137,334 | 11,813 | -0- | -0- | 149,147 |
| Fixed income | 311,963 | 26,835 | -0- | -0- | 338,798 |
| International | 181,396 | 15,603 | -0- | -0- | 196,999 |
| Total fair value | 3,197,130 | 1,456,756 | 161,069 | 1,154,257 | 5,969,212 |
| Cash | 10,693 | 336,702 | -0- | -0- | 347,395 |
| Total investments | \$ 3,207,823 | \$ 1,793,458 | \$ 161,069 | \$ 1,154,257 | \$ 6,316,607 |

The Ministry's policy is to recognize transfers between levels as of the end of the reporting period. There were no transfers among levels within the hierarchy at May 31, 2018 and 2017.

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 SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

The following schedules summarize investment return and its classification in the consolidated statements of activities for the years ended May 31:

| | 2018 | | |
|------------------------------------|-------------------|------------------------|-------------------|
| | Unrestricted | Temporarily Restricted | Total |
| Capital and general operating | | | |
| Interest and dividend income | \$ 49,326 | \$ -0- | \$ 49,326 |
| Realized and unrealized gains, net | 175,111 | -0- | 175,111 |
| Investment service fees | <u>(12,267)</u> | <u>-0-</u> | <u>(12,267)</u> |
| Investment return, net | <u>\$ 212,170</u> | <u>\$ -0-</u> | <u>\$ 212,170</u> |
| Endowment and other | | | |
| Interest and dividend income | \$ 44,960 | \$ 170,370 | \$ 215,330 |
| Realized and unrealized gains, net | 27,410 | 80,359 | 107,769 |
| Investment service fees | <u>(4,392)</u> | <u>(4,159)</u> | <u>(8,551)</u> |
| Investment return, net | <u>\$ 67,978</u> | <u>\$ 246,570</u> | <u>\$ 314,548</u> |
| | | | |
| | 2017 | | |
| | Unrestricted | Temporarily Restricted | Total |
| Capital and general operating | | | |
| Interest and dividend income | \$ 41,756 | \$ -0- | \$ 41,756 |
| Realized and unrealized gains, net | 149,638 | -0- | 149,638 |
| Investment service fees | <u>(8,844)</u> | <u>-0-</u> | <u>(8,844)</u> |
| Investment return, net | <u>\$ 182,550</u> | <u>\$ -0-</u> | <u>\$ 182,550</u> |
| Endowment and other | | | |
| Interest and dividend income | \$ 26,797 | \$ 81,900 | \$ 108,697 |
| Realized and unrealized gains, net | 50,549 | 164,976 | 215,525 |
| Investment service fees | <u>(3,806)</u> | <u>(1,877)</u> | <u>(5,683)</u> |
| Investment return, net | <u>\$ 73,540</u> | <u>\$ 244,999</u> | <u>\$ 318,539</u> |

5. LINE OF CREDIT AGREEMENT

The Ministry has a \$500,000 revolving line of credit facility available with a bank through October 24, 2018, at which time it is subject to renewal. Borrowings under this facility are secured by substantially all assets of the Ministry, and bear interest at the prime rate less 1.00% (3.75% at May 31, 2018). There were no borrowings on this facility as of May 31, 2018 and 2017.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017**6. NET ASSETS**Temporarily Restricted Net Assets

Temporarily restricted net assets are available for the following purposes or periods at May 31:

| | <u>2018</u> | <u>2017</u> |
|-------------------------------|---------------------|-------------------|
| Purpose restriction: | | |
| Center for Women and Children | \$ 74,230 | \$ 35,016 |
| Camp Dormitory | 202,372 | -0- |
| Capital campaign | 224,013 | -0- |
| Restored creations | -0- | 25,712 |
| Other programs | 108,545 | 56,577 |
| Time restriction: | | |
| Charitable remainder trusts | 515,349 | 423,244 |
| Drumstick Dash | 23,900 | 54,200 |
| Other | -0- | 10,000 |
| Endowment return: | | |
| Programs | <u>375,573</u> | <u>245,357</u> |
| | <u>\$ 1,523,982</u> | <u>\$ 850,106</u> |

Permanently Restricted Net Assets

Permanently restricted net assets are restricted for investment in perpetuity, with the income expendable as described below at May 31:

| | <u>2018</u> | <u>2017</u> |
|--|---------------------|---------------------|
| Contributions receivable: | | |
| Support of director of food service position | \$ -0- | \$ 125,000 |
| Endowment: | | |
| Support of director of food service position | 500,000 | 375,000 |
| Spiritual work | 12,509 | 12,509 |
| Operations | 20,658 | 20,658 |
| Center for Women and Children or Training | | |
| Center at Camp Hunt | <u>770,233</u> | <u>770,233</u> |
| Total endowment | <u>1,303,400</u> | <u>1,178,400</u> |
| | <u>\$ 1,303,400</u> | <u>\$ 1,303,400</u> |

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017Net Assets Released from Restrictions

Net assets were released from donor-imposed restrictions as follows during the years ended May 31:

| | <u>2018</u> | <u>2017</u> |
|--|-------------------|---------------------|
| Purpose restriction: | | |
| Center for Women and Children | \$ 224,361 | \$ 157,937 |
| Camp Dormitory | 22,628 | -0- |
| Training Center at Camp Hunt | -0- | 42,911 |
| Shelter for Men | -0- | 17,678 |
| Provide shelter, food, and medical assistance under various other programs | 446,396 | 500,555 |
| Restored creations | 25,762 | 41,212 |
| Director of food service | -0- | 26,548 |
| Capital gifts | 151,907 | 594,023 |
| Time restriction: | | |
| Contributions receivable | -0- | 34,549 |
| Drumstick Dash | 46,700 | 48,500 |
| Other | 10,254 | -0- |
| | <u>\$ 928,008</u> | <u>\$ 1,463,913</u> |

7. ENDOWMENT

The Ministry's endowment consists 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 has interpreted the Uniform Prudent Management of Institutional Funds Act (UPMIFA) as 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, the Ministry classifies as permanently restricted net assets (a) the original value of the gifts donated to the permanent endowment, (b) the original value of subsequent gifts to the permanent endowment, and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulations are added to the fund.

The remaining portion of the donor-restricted endowment fund that is not classified in permanently restricted net assets is classified as temporarily restricted net assets until those

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

amounts are appropriated for expenditure by the Ministry in a manner consistent with the standard of prudence prescribed by UPMIFA.

In accordance with UPMIFA, 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

Funds with Deficiencies

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, 2018 and 2017.

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 endowment 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 a greater emphasis on equity-based investments to achieve its long-term return objectives within prudent risk constraints.

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. 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. In establishing this policy, the Ministry intends to maintain

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

the corpus of the permanently restricted portion of the gift. This is consistent with the Ministry's objective 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 cash and investments functioning as endowment is as follows at May 31:

| | 2018 | | | |
|----------------------------------|-------------------|------------------------|------------------------|---------------------|
| | Unrestricted | Temporarily Restricted | Permanently Restricted | Total |
| Donor restricted endowment funds | \$ -0- | \$ 375,573 | \$ 1,303,400 | \$ 1,678,973 |
| Board designated endowment funds | 546,024 | -0- | -0- | 546,024 |
| | <u>\$ 546,024</u> | <u>\$ 375,573</u> | <u>\$ 1,303,400</u> | <u>\$ 2,224,997</u> |

| | 2017 | | | |
|----------------------------------|-------------------|------------------------|------------------------|---------------------|
| | Unrestricted | Temporarily Restricted | Permanently Restricted | Total |
| Donor restricted endowment funds | \$ -0- | \$ 245,357 | \$ 1,178,400 | \$ 1,423,757 |
| Board designated endowment funds | 494,701 | -0- | -0- | 494,701 |
| | <u>\$ 494,701</u> | <u>\$ 245,357</u> | <u>\$ 1,178,400</u> | <u>\$ 1,918,458</u> |

The change in cash and investments functioning as endowment is as follows for the years ended May 31:

| | 2018 | | | |
|--|-------------------|------------------------|------------------------|---------------------|
| | Unrestricted | Temporarily Restricted | Permanently Restricted | Total |
| Endowment net assets, beginning of year | \$ 494,701 | \$ 245,357 | \$ 1,178,400 | \$ 1,918,458 |
| Deposits | -0- | -0- | 125,000 | 125,000 |
| Investment return, net | 51,323 | 130,216 | -0- | 181,539 |
| Endowment net assets, end of year | <u>\$ 546,024</u> | <u>\$ 375,573</u> | <u>\$ 1,303,400</u> | <u>\$ 2,224,997</u> |

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARYNOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

| | 2017 | | | Total |
|--|-------------------|------------------------|------------------------|---------------------|
| | Unrestricted | Temporarily Restricted | Permanently Restricted | |
| Endowment net assets, beginning of year | \$ 439,577 | \$ 142,762 | \$ 715,967 | \$ 1,298,306 |
| Deposits | -0- | -0- | 462,433 | 462,433 |
| Investment return, net | 55,124 | 102,595 | -0- | 157,719 |
| Endowment net assets, end of year | <u>\$ 494,701</u> | <u>\$ 245,357</u> | <u>\$ 1,178,400</u> | <u>\$ 1,918,458</u> |

8. EMPLOYEE BENEFITSRetirement 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 \$205,470 and \$181,723 for the years ended May 31, 2018 and 2017, 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 \$26,430 and \$33,500 to the plan during the years ended May 31, 2018 and 2017, respectively.

Health Insurance

The Ministry provides its regular full-time employees with medical health insurance. Regular full-time employees may choose to have their eligible family members covered under the health care plan as well. Participants are 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. Participants should refer to the benefits booklet for a more complete description of the benefit provisions. Contribution expense under this plan was \$468,131 and \$428,038 for the years ended May 31, 2018 and 2017, respectively.

9. CONCENTRATIONS

The Ministry maintains its cash (including cash held in the investment portfolio) 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.

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY

NOTES TO CONSOLIDATED FINANCIAL STATEMENTS
MAY 31, 2018 AND 2017

All of the Ministry's investments are managed by one investment management firm. The Ministry was invested in one mutual fund that comprised approximately 13% of total investment at May 31, 2018 and a separate mutual fund that comprised of approximately 26% of total investments at May 31, 2017.

At May 31, 2017, the Ministry had an amount due from one donor representing 70% of contributions receivable.

SUPPLEMENTARY INFORMATION

WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARY

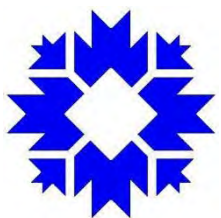
**CONSOLIDATED STATEMENT OF PROGRAM SERVICES EXPENSES
YEAR ENDED MAY 31, 2018**

(With Comparative Total for the Year Ended May 31, 2017)

| | 2018 | | | | | | | | | | | | | 2017 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 | \$ 529,751 | \$ 805,415 | \$ 685,561 | \$ 390,427 | \$ 173,089 | \$ 96,549 | \$ 352,318 | \$ 819,569 | \$ 181,660 | \$ 207,469 | \$ 391,357 | \$ 22,731 | \$ 4,655,896 | \$ 4,147,340 |
| Gift-in-kind expenses | 135,565 | 509,438 | 106,996 | 116,116 | -0- | 687 | -0- | -0- | 142,345 | 78,760 | -0- | -0- | 1,089,907 | 1,047,779 |
| Public relations and direct mailing | -0- | -0- | -0- | 497 | -0- | -0- | 2,514 | -0- | 182,523 | 94 | -0- | 1,251 | 186,879 | 148,479 |
| Telephone and utilities | 124,625 | 107,571 | 89,956 | 167,390 | 13,337 | 12,006 | 35,320 | 2,984 | 33,535 | 23,025 | -0- | 4,572 | 614,321 | 559,554 |
| Depreciation expense | 99,195 | 169,079 | 157,846 | 85,544 | 42,157 | 3,628 | 37,567 | -0- | 14,084 | 11,161 | -0- | -0- | 620,261 | 572,598 |
| Postage | 324 | -0- | -0- | -0- | -0- | 45 | -0- | 79 | 548 | 12 | -0- | -0- | 1,008 | 720 |
| Maintenance | 41,419 | 37,553 | 48,964 | 50,018 | 13,603 | 5,244 | 31,896 | 5,050 | 14,398 | 9,097 | 13,935 | 2,621 | 273,798 | 235,333 |
| Insurance | 16,420 | 19,213 | 20,850 | 15,360 | 19,083 | 4,245 | 10,613 | 20,106 | 7,917 | 5,017 | 10,509 | -0- | 149,333 | 134,141 |
| Food | -0- | 3,541 | -0- | 2,216 | -0- | 1,114 | -0- | -0- | -0- | 4,431 | 138,652 | -0- | 149,954 | 137,251 |
| Equipment repair and maintenance | 11,087 | 7,468 | 15,033 | 18,496 | 22,205 | 3,706 | 4,622 | 14,525 | 9,896 | 6,644 | 22,238 | 511 | 136,431 | 152,038 |
| Cleaning supplies | 4,972 | 10,350 | 10,457 | 9,842 | -0- | 434 | 946 | -0- | 6,928 | 4,907 | 11,607 | -0- | 60,443 | 52,577 |
| Fuel and oil | 2,507 | 1,476 | 1,650 | 16,605 | 20,797 | 3,012 | 6,903 | 2,578 | 3,360 | 41 | 7,084 | -0- | 66,013 | 38,269 |
| Professional services | 1,873 | 2,497 | 15,402 | 2,288 | 3,122 | 354 | 13,368 | -0- | 1,180 | 645 | 1,685 | 133 | 42,547 | 94,050 |
| Program materials | 5,468 | 6,778 | 21,840 | 8,722 | -0- | 4,748 | 4,748 | 3,980 | 1,023 | 2,771 | -0- | 780 | 60,858 | 51,834 |
| Office supplies | 1,332 | 1,424 | 3,001 | 2,411 | 513 | 365 | 500 | 2,769 | 1,801 | 292 | 535 | 1,330 | 16,273 | 13,037 |
| Staff travel and conferences | 4,216 | 3,930 | 11,773 | 690 | -0- | 1,576 | 1,000 | 6,792 | -0- | 516 | 3,035 | 36 | 33,564 | 31,300 |
| Industry and supplies | -0- | -0- | -0- | -0- | 862,887 | -0- | -0- | -0- | -0- | -0- | -0- | 21,228 | 884,115 | 625,353 |
| Grants and scholarships | 10,050 | -0- | -0- | 42,250 | -0- | 4,400 | -0- | -0- | -0- | -0- | -0- | -0- | 56,700 | 39,990 |
| Membership fees | 1,373 | 1,172 | 1,291 | 1,238 | 942 | 82 | -0- | 2,632 | 302 | 218 | 686 | 35 | 9,971 | 9,149 |
| Lockbox and bank fees | -0- | -0- | -0- | -0- | -0- | -0- | 6,493 | -0- | 2,129 | -0- | -0- | 442 | 9,064 | 7,772 |
| Miscellaneous | 4,878 | 4,500 | 578 | 509 | -0- | -0- | 933 | 3,730 | 396 | 208 | 1,613 | 7,988 | 25,333 | 24,439 |
| | <u>\$ 995,055</u> | <u>\$ 1,691,405</u> | <u>\$ 1,191,198</u> | <u>\$ 930,619</u> | <u>\$ 1,171,735</u> | <u>\$ 142,195</u> | <u>\$ 509,741</u> | <u>\$ 884,794</u> | <u>\$ 604,025</u> | <u>\$ 355,308</u> | <u>\$ 602,936</u> | <u>\$ 63,658</u> | <u>\$ 9,142,669</u> | <u>\$ 8,123,003</u> |

See report of independent auditors on pages 1 and 2.

24



CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION

AGENCY CONTACT INFORMATION

Lead Agency Name: Area 10 Agency on Aging

Address: 631 W. Edgewood Dr., Ellettsville, IN 47429

Phone: 812-876-3383

E-Mail: cmyers@area10agency.org

Website: www.area10agency.org

President of Board of Directors: Doug Johnson

Name of Executive Director: Chris Myers

Phone: 812-876-3383 ext. 503

E-Mail: cmyers@area10agency.org

Name and Title of Person to Present Proposal to the Committee: Chris Myers, CEO

Phone: 812-876-3383 ext. 503

E-Mail: cmyers@area10agency.org

Name of Grant Writer: Chris Myers

Phone: 812-876-3383 ext. 503

E-Mail: cmyers@area10agency.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [X] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 62 | 11 | 250 |

AGENCY 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 Area 10 Agency on Aging is to serve as a leader in providing resources, solutions and connections for seniors, persons with disabilities and family caregivers living in Monroe and Owen counties.

PROJECT INFORMATION

Project Name: Expansion Endwright Center services to Bloomington

Total cost of project: \$16,476.56

Requested amount of JHSSF funding: \$9,775.48

Total number of City residents anticipated to be served by this project in 2019: 14,265

Total number of clients anticipated to be served by this project in 2019: 125

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Area 10 requests \$9,775.48 to support the initial expansion of our successful senior center programming at the Endwright Center into a City of Bloomington location, making these health and wellness programs more accessible to a greater population.

Since January, a small collaborative committee has been meeting to address this need. A partnership between Area 10, IU Health Alzheimer's Resource Service, and City of Bloomington Parks and Recreation has developed to support the expansion of services at a pilot satellite site June - December 2019. The partners will continue to collaborate to secure funding beyond 2019 if the pilot project is successful.

In 2016 and 2019 community surveys, older adults in Bloomington continually express the need for a senior center in the City. They need wellness opportunities as well as socialization provided by a supportive, vibrant, and accessible senior center.

Evidence based programming increases physical strength (94.5%) and social well-being (64.9%), based on participant assessments at the Endwright Center. Confidence levels in performing Activities of Daily Living (ADLs) increase, while pain felt decreases.

Address where project will be housed: Collaborative committee is researching options and have had conversations with local churches. We have not proposed project for full space approval without having basic staff funding to kick-start the project. Possibilities the committee are considering are: First United Church, where Area 10 also runs two Mobile Food Pantry routes each month; College Mall (vacant store space), and; First United Methodist Church.

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 to capital improvements to real estate and if you do not own the property at which the project 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.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

Area 10 is partnering with IU Health, specifically the Alzheimer's Resource Service and the City of Bloomington Parks and Recreation and Commission on Aging on this concept. Area 10 focuses on services and resources for older adults and persons with disabilities. One of our programs that we support is the Endwright Center, a vibrant community senior center in Ellettsville. The Center speaks to importance on preventative medicine, so to speak, on improving the aging process by improving individuals' physical and mental health, as well as combatting social isolation. IU Alzheimer's Resource Center provides education, screening, and support for persons living with dementia and their care partners. They are a natural partner for resources, education sessions, and community referrals/connections, as they are now with Area 10. The COB's Parks and Rec obviously is charged with a much broader service demographic and range, which does include recreational center inclusive of senior programming. Commissioners on Aging will support scholarships to cover low program fees for seniors unable to pay. Our committee has been meeting regularly in 2019 and is committed to coordinating community resources for programming at the expanded Center site and promotion. The committee's intent is to quickly build upon the connections and programming that Area 10 already has to implement a viable Center alternative for Bloomington residents and assess demands and changes along the way. We all know from many community conversations and survey results that there is a stated demand for a Center in the City, specifically for wellness programming. Fitness programming needs are met through Twin Lakes and the Y. With successful launching, we will build the ongoing staff support to continue its operation past the pilot stage.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project *(Please indicate source, amount, and whether confirmed or pending):* \$2,421.08 Area 10 (Center oversight, printing/advertising, and laptop); \$360 IU Alzheimer's Resource Center (staff for 2 per month education sessions); \$3,070 Parks & Rec for furnishings; and Commission on Aging scholarship support (TBD).

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

Cash expenses would be paid by Area 10 and submitted to the City on a quarterly reimbursement basis.

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.

Area 10 relies heavily on volunteers to operate the Endwright Center. We have a successful recruitment and retention experience and will extend that to support the City Center location. Anticipate at least two volunteers per week to work alongside on-site Area 10 staff person. Programming will begin with wellness activities (balance class, Walk with Ease, Stepping On) and arts/music possibly expanding. The latter would be supported by Area 10's Indiana Arts Commission grant and program fees. Educational programming will be coordinated with partners from Purdue Extension, IU Trauma Center, area professionals, and IU Alzheimer's Resource Service, as referenced above.

FUNDING PRIORITIES -- RANKED

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

Yes No

If "yes", please provide an itemized list of program elements, ranked by priority and cost:

| | Item | Cost |
|------------------------|--|-------------------|
| Priority #1 | Expanded Center on-site staff specialist (6/17/19 to 12/31/19) - 12 hrs/week for 28 weeks | \$7,116.48 |
| Priority #2 | Estimate space rental costs at \$500/mo for six months | \$3,000.00 |
| Priority #3 | Dedicated cell phone for Center operations | \$259.00 |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

In January 2016, Area 10 conducted a community wide assessment for our Endwright Center services. 76% live in Bloomington, want expanded services on Tuesdays and Thursdays (at 60%), and would likely attend fitness (62%), educational (57%), and arts (42%). Favored educational programs were on nutrition/weight loss and mental health support and resources. For our 2019 Community Needs Survey for older adults, respondents identified a senior center in Bloomington as one of their "top three priorities." About 47% of respondents identified "wellness opportunities" as inadequate or insufficient, while 40% identified "fitness opportunities" as such. As a program of Area 10, the Endwright Center is distinctive in our community. We are uniquely dedicated to providing a safe and supportive environment where active older adults can enhance their well-being through health, fitness, friendship and creative arts programming, with an emphasis on keeping classes free or affordable for all seniors. Our evidence based programming we know 94.5% report improved physically and 64.9% social well-being. At least 30% increases in confidence performing ADLs, strength, maintaining and regaining balance, and flexibility reported in assessments after one year of activities. Additionally, participants reported decreased pain. With City programming, we estimate serving at least 125 older adults initially.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

We are requesting a one-time funding to get the expansion of services started for the remainder of 2019 with the intent of securing ongoing operational support through our partnership. One-time funding would support a staff person on-site for planning, coordinating and staffing Center operations two days per week. Area 10 would provide Center oversight, a dedicated laptop, and advertising/printing in-kind.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Extending Center services to the City will increase physical and mental health of older adults who otherwise cannot afford or access alternative services. Individuals will have a drastically reduced experience of social isolation. Creative arts activities will enhance brain health, as well as coordination, to improve the quality of life for older adults as they age. Balance related programming will yield a reduction in falls, a serious threat to older adults. Though we do not have participant specific results that tie improvements to overall cost to the health care system, we know nationally that they do. The CDC reports that physically active adults generally live longer and have lower risk of heart disease, strong type 2 diabetes, depression, some cancers, and obesity (State Indicator Report on Physical Activity).

Evidence shows that preventions of falls improves quality of life and greatly reduces health care costs, as well as giving older adults longer productive and independent lives (Health Professional's Handbook). Annual direct medical costs for fall injuries are \$31 billion. Our programming is proven to reduce risks of falls, as well as improve social connections. Older adults account for 12% of the population now and estimated to increase to 17.5% by 2050.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

Through expanded City services, we expect to serve initially 125 older adults in 2019 and increase annually thereafter. For comparison, we serve about 500 older adults at our Endwright Center and about 16,000 visits annually. Center will provide programming and social gathering activities at least two days per week from 10 a.m. to 3 p.m.

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.

Though the Endwright Center charges a low, affordable annual member fee of \$45, we will not be charging a fee for the City senior center. The expanded location will focus on wellness programming and not have the fitness equipment and coaching that regular memberships include. Some programs will be free of charge: balance, Walk with Ease, some educational. Others will have a low fee: arts, yoga, Tai Chi, etc. For individuals who will not be able to afford the program fee, the Commission on Aging has committed to a scholarship fund to support everyone's participation.

| 2019 Jack Hopkins Grant | | | | |
|--|---|---------------------|----------------------|--|
| Area 10 City Senior Center Project Budget | | | | |
| Description | Calculation | Cost | Source | |
| On site staff person | 10 hrs program + 2 hrs plan per week for 28 wks (6/17/19 - 12/31/19) at loaded rate \$21.18/hr | \$ 7,116.48 | Grant | |
| Cell phone for on-site access | \$37/mo x 7 mos. | \$ 259.00 | Grant | |
| Estimated space costs | \$500 /mo x 6 mos. | \$ 3,000.00 | Grant | |
| Advertising & printing program guides and service outreach | \$45 every two months (A10) + \$125 x 2 times (COB) | \$ 385.00 | Area 10; Parks & Rec | |
| Activities & Programming Manager oversight | 2 hrs per week at loaded rate \$21.18/hr | \$ 1,186.08 | Area 10 | |
| Educational programming sessions | 2 sessions/mo at \$30 per session | \$ 360.00 | IU Health | |
| Laptop for on site staff person | cost of purchase | \$ 1,100.00 | Area 10 | |
| Furnishings | couch, bookshelves, tables, arm chairs, professional coffee pot | \$ 3,070.00 | Parks & Rec | |
| | | | | |
| Total Cost 6/17/19 - 12/31/19 Bridge Funding | | \$ 16,476.56 | | |
| | | | | |
| Estimated Project Revenue | Fees at \$5 x 20 part. x 6 mo. | \$ 600.00 | | |
| In-kind donations | Area 10, Parks & Rec, IU Alzheimer's Resource Servi | \$ 6,101.08 | | |
| | | | | |
| Grant Support 6/17/19 - 12/31/19 Bridge Funding | | \$ 9,775.48 | | |

**Memorandum of Understanding
For
Support of Expanded Senior Center in City of Bloomington**

This Memorandum of Understanding (“MOU”) is made and entered into this 29th day of March, 2019, between Area 10 Agency on Aging, IU Health Alzheimer’s Resource Service, City of Bloomington Parks and Recreation and Commission on Aging.

WHEREAS, there is a demonstrated need to create a Senior Center in the City of Bloomington for wellness programming; and

WHEREAS, Area 10 Agency on Aging’s Endwright Center operates a successful, vibrant senior community center in Ellettsville; and

WHEREAS, Area 10 seeks partnership with other entities to create a pilot Senior Center space in the City of Bloomington modeled after the Endwright Center offerings; and

WHEREAS, the IU Alzheimer’s Resource Service, City of Bloomington Parks and Recreation and Commission on Aging all have vested interest in supporting successful expanded senior center programming in the City of Bloomington; and

WHEREAS, all entities are committed to the development of such center;

NOW, THEREFORE, IN CONSIDERATION of the mutual promise and conditions as set forth herein, the parties hereto agree as follows:

During the term of this agreement, **Area 10 Agency on Aging** agrees to provide the following services for the Bloomington Senior Center project:

1. Covering the liability of space use agreement;
2. Hiring, training, and oversight of on-site senior center staff;
3. Coordination of all programming, logistics, and funding related to operation of center;
4. Development and coordination of strategic outreach, advertising and marketing for the new center;
5. Assign one cell phone for on-site staff’s use, as well as a laptop computer.

IU Alzheimer’s Resource Service agrees to:

1. Development and provision of at least two educational programs each month to be held at the center.
2. Inclusion of programming and offerings in regular Service’s newsletters.

City of Bloomington Parks and Recreation agrees to:

1. Provide center furnishings available such as a couch, bookshelves, coffee pot, tables and chairs, etc.
2. Inclusion of programming and offerings in the seasonal program guide.

City of Bloomington's Commission on Aging agrees to:

1. Develop and support a scholarship fund to support any senior's participation in the low cost wellness programming if senior is unable to afford the fee.

Terms of this Agreement:

1. The effective date of this agreement is March 29, 2019 and will expire on December 31, 2019, unless earlier terminated in accordance with this agreement. The term of this agreement may be extended by mutual consent of all parties based upon the availability of future funds.
2. All entities agree to meet regularly during the development of senior center.
3. All entities agree to advocate for the importance of the center and its ongoing sustainable resources during the 2019 pilot stage.
4. Monroe and Owen County Adult Guardianship Program agrees to provide Monroe Circuit Court with a copy of their annual financial review, which is required by the Adult Guardianship Office's Program Standards and Code of Ethics.
5. Any party may terminate its contribution to this agreement by notifying the other parties in writing of its desire to terminate. Notice of intent to terminate this agreement must be made in writing at least thirty days (30) days in advance of the termination date.

Chris Myers, CEO Area 10 Agency on Aging Date

Paula McDevitt, Director City of Bloomington Parks and Recreation Dept. Date

Beverly Calender-Anderson, Director City of Bloomington Community and Family Resources Department Date

Dayna Thompson, Educator IU Alzheimer's Resource Service Date

**Memorandum of Understanding
For
Support of Expanded Senior Center in City of Bloomington**

This Memorandum of Understanding ("MOU") is made and entered into this 29th day of March, 2019, between Area 10 Agency on Aging, IU Health Alzheimer's Resource Service, City of Bloomington Parks and Recreation and Commission on Aging.

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2. Inclusion of programming and offerings in regular Service's newsletters.

City of Bloomington Parks and Recreation agrees to:

Area 10 Agency on Aging, Alzheimer's Resource,
City's Parks & Recreation and Commission on Aging

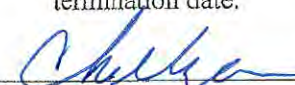
1. Provide center furnishings available such as a couch, bookshelves, coffee pot, tables and chairs, etc.
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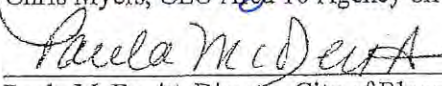
City of Bloomington's Commission on Aging agrees to:

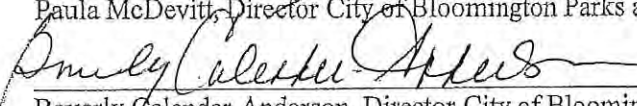
1. Develop and support a scholarship fund to support any senior's participation in the low cost wellness programming if senior is unable to afford the fee.

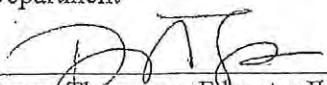
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Chris Myers, CEO Area 10 Agency on Aging 4/1/19
Date


Paula McDevitt, Director City of Bloomington Parks and Recreation Dept. 3-29-19
Date


Beverly Calender-Anderson, Director City of Bloomington Community and Family Resources Department 4-1-19
Date


Dayna Thompson, Educator IU Alzheimer's Resource Service 3.29.19
Date

Area 10 Agency on Aging

Balance Sheet

As of 6/30/2018

| | Current Year |
|--|--------------|
| Assets | |
| Cash | |
| PSB Checking | 49,920.59 |
| Putnam County RT Cash | 35,367.12 |
| Payroll Cash | 1.00 |
| Savings Cash | 560,280.85 |
| Petty Cash | 275.00 |
| Total Cash | 645,844.56 |
| Accounts Receivable | 100,982.51 |
| Grants Receivable | 674,790.26 |
| Prepays | 982.65 |
| Related Party Receivable | |
| Related Party Receivable | 281,646.94 |
| Edgewood Developer Fee Interest Receivable | 65,255.52 |
| Total Related Party Receivable | 346,902.46 |
| Loans Receivable | |
| Reserve Uncollectible Notes Receivable | (668,254.98) |
| Notes Receivable | 402,000.00 |
| Notes Receivable-Cunot IHFA | 350,000.00 |
| Loan Interest Receivable-Cunot IHFA | 49,000.00 |
| Notes Receivable-Cunot Other Loan | 127,798.01 |
| Loan Interest Receivable-Cunot Other Loan | 158,424.21 |
| Notes Receivable-Edgewood Other Loan | 471,836.77 |
| Loan Interest Receivable-Edgewood Other Loan | 654,712.00 |
| Total Loans Receivable | 1,545,516.01 |
| Fixed Assets | |
| Building-Endwright Center | 1,419,405.06 |
| Accumulated Depreciation-Building | (765,742.84) |
| Building Improvements | 17,614.79 |
| Accumulated Depreciation-Improvements | (18,495.54) |
| Equipment | 39,369.00 |
| Accumulated Depreciation-Equipment | (27,432.46) |
| Total Fixed Assets | 664,718.01 |
| Endowment | 38,390.21 |
| Total Assets | 4,018,126.67 |
| Liabilities | |
| Accounts Payable | |
| Accounts Payable | 259,092.45 |
| Total Accounts Payable | 259,092.45 |
| Salary and Vacation Payable | |

Area 10 Agency on Aging

Balance Sheet

As of 6/30/2018

| | Current Year |
|--|------------------|
| Vacation Liability Payable | 53,424.86 |
| Sick Bank Liability | 12,251.90 |
| Total Salary and Vacation Payable | 65,676.76 |
| Notes Payable | 402,000.00 |
| Other Liabilities | |
| Security Deposits Payable | 3,096.23 |
| Total Other Liabilities | 3,096.23 |
| Total Liabilities | 729,865.44 |
| Net Assets | |
| Net Assets, Beginning of the Period | |
| Unrestricted Net Assets | 542,915.78 |
| Dedicated Fund-Capital Expenditures | 106,865.73 |
| Dedicated Fund-Cunot HSG | 614,136.29 |
| Dedicated Fund-Edgewood Housing | 1,772,473.01 |
| Dedicated Fund-In Home Services | 575.15 |
| Dedicated Fund-Transit Services | 635.11 |
| Dedicated Fund-Elderly Services | 6,404.16 |
| Permanently Restricted Assets-Owen Community Found | 6,421.12 |
| Permanently Restricted-Monroe County Community Foundation | 30,484.42 |
| Donor Restricted Net Assets | 9,448.00 |
| Net Assets from Restr Prog Inc | 36,598.03 |
| Total Net Assets, Beginning of the Period | 3,126,956.80 |
| Excess of Revenues over Expenses | 161,304.43 |
| Total Net Assets | 3,288,261.23 |
| Liabilities and Net Assets | 4,018,126.67 |

Area 10 Agency on Aging, Alzheimer's Resource,
City's Parks & Recreation and Commission on Aging

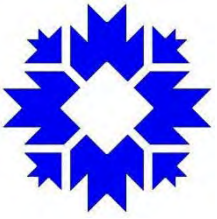
Area 10 Agency on Aging
Statement of Rev & Expenses
From 7/1/2017 Through 6/30/2018

| | Current Year Actual |
|---|---------------------|
| Revenues | |
| Contract Income-Federal | 1,634,464.68 |
| Program Fees | 183,849.27 |
| Contract Income-State | 975,920.91 |
| Contract Income-Local | 136,734.58 |
| Contract Income-Medicaid | 507,618.70 |
| Project Income | 239,448.53 |
| Older Hoosiers-Matching Income | 29,534.62 |
| Donations | 166,572.89 |
| Interest Income | 140.31 |
| Investment GAIN/LOSSES | 2,358.04 |
| InKind Income | 172,947.40 |
| RT Transportation Services | 129,508.40 |
| FARE REVENUE | 61,290.10 |
| Misc Revenue | 23,789.20 |
| Bus Advertising Rev | 29,175.95 |
| Program Inc Restricted for Future Years | 36,598.03 |
| Total Revenues | 4,329,951.61 |
| Expenses | |
| Salaries & Wages | 1,305,031.79 |
| END CTR DIR SALARY | 1,523.16 |
| Salaries-Other | 473,304.98 |
| Fringe Benefits | 319,941.57 |
| Utilities | 71,178.05 |
| SPACE | 17,561.36 |
| Telephone | 16,644.99 |
| POSTAGE | 3,179.30 |
| Materials/Supplies | 87,568.83 |
| Volunteer Recognition | 24,911.24 |
| LEASES | 2,392.36 |
| Copier/Printer Costs | 9,976.51 |
| Travel | 34,617.50 |
| Long Distance Travel | 518.48 |
| Professional Services | 134,812.38 |
| Profit/Loss | 3,976.46 |
| LEGAL SERVICES | 4,782.25 |
| Attendant | 421,087.75 |
| Home Delivered Meals | 133,325.98 |
| Homemaker Services | 85,267.56 |
| Home Health Aide | 353.28 |
| Transportation | 240.00 |
| PRSM | 23,147.53 |
| MEDI | 3,398.72 |
| PEST | 9,192.28 |
| Environ Mod-Install | 2,650.00 |
| EMOI | 5,845.00 |
| Meal Expense | 78,916.53 |
| Physical Exams | 3,719.15 |
| Training | 3,168.21 |
| Casualty & Liability Insurance | 130,949.93 |
| Equipment | 113,393.00 |

Area 10 Agency on Aging, Alzheimer's Resource,
City's Parks & Recreation and Commission on Aging

Area 10 Agency on Aging
Statement of Rev & Expenses
From 7/1/2017 Through 6/30/2018

| | <u>Current Year Actual</u> |
|----------------------------------|----------------------------|
| Materials-Tires | 11,948.78 |
| Contract Labor | 53,765.10 |
| Materials-Fuel | 182,943.91 |
| Advertising & Recruitment | 6,826.37 |
| Indirect Costs | 279,558.88 |
| Taxes | 2,851.55 |
| Miscellaneous | 9,265.35 |
| Emergency Food Expense | 15,956.02 |
| Depreciation | 49,420.47 |
| IIIB SERVICES OH-MATCH | 12,414.70 |
| IIIC-1 OH-MATCH | 6,176.28 |
| IIIC-2 OH MATCH | 7,647.00 |
| IIIE I&R OH-MATCH | <u>3,296.64</u> |
| Total Expenses | <u>4,168,647.18</u> |
| Excess of Revenues over Expenses | <u><u>161,304.43</u></u> |



CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION

AGENCY CONTACT INFORMATION

Lead Agency Name: Center for Sustainable Living

Address: PO Box 1665, Bloomington, IN, 47408

Phone:

E-Mail: contact@simplycsl.org

Website: www.simplycsl.org

President of Board of Directors: Andrea Avena-Koenigsberger

Name of Executive Director: In lieu of a directorship, the CSL operates by means of an all-volunteer “working board.” For the purposes of this application, CSL board President, Andrea Avena Koenigsberger, represent.

Phone: (812) 369-9530

E-Mail: president@simplycsl.org

Name and Title of Person to Present Proposal to the Committee: Hugh Farrell

Phone: (317) 281 0251

E-Mail: farr.hugh@gmail.com

Name of Grant Writer: Andrea Avena-Koenigsberger, Ryan Conway, Bradi Heberlin

Phone: (812) 369-9530

E-Mail: contact@simplycsl.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|------------|
| 0 | 0 | ~110 |

AGENCY 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.

Lead organization’s mission statement:

It is the mission of the CSL to make available information, services, projects and networking opportunities for those interested in exploring ecologically sustainable ways of thinking, living and interacting in our community.

The CSL was formed by Bloomington residents in 1992 as an umbrella organization which provides 501(c)3 status to projects, created by community members, that adhere to our goals. Our organization is entirely volunteer-run and depends on funds raised by members to provide quality programming, events, and information about sustainable living

Partner organization’s mission statement:

Our mission is to develop the capabilities of ex-offenders who have made up their mind to stay out of prison, through our transitional life training and hands-on work experience, thus breaking the cycle of homelessness, addiction, and incarceration.

MUM was incorporated in November of 2017, in light of our growing community challenge to reunite and heal families that are handicapped by their traumatic experiences of incarceration, addiction, and poverty. MUM exists to help ex-offenders navigate the landscape of social services in Bloomington, and to provide an individually-tailored, relationship-centered support structure that weaves-together existing ex-offender services while supplementing service-gaps with unique courses, programs, and personal development opportunities that, in combination, restore client self-sufficiency, family relations, and sense of community.

PROJECT INFORMATION

Project Name: The Overlook

Total cost of project: \$95,967

Requested amount of JHSSF funding: \$32,517

Total number of City residents anticipated to be served by this project in 2019: We estimate that this project can serve over 300 clients in its first year, and increase the number of served residents in the future.

Total number of clients anticipated to be served by this project in 2019: We intend to serve city residents, primarily, and estimate a clientele of 300 people

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

The Center for Sustainable Living and Made Up Mind request \$32,517 to fund the expansion of the Glenn Carter Memorial Toolshare (GCMT) programming and services, and building renovations for The Overlook Community Center, new home of the Glenn Carter Memorial Toolshare (GCMT). Funding will cover water and sewer hook-up costs, an ADA-compliant bathroom, and a temporary staff position that will oversee the expansion of the GCMT programming and services.

Building on a lifetime of service by Bloomington activist Glenn Carter, the GCMT preserves Glenn's 5000+ tools and makes them accessible to Bloomington residents, free of cost. Since 2015, over 150 volunteers have sorted, cleaned, and catalogued Glenn's collection. Our mission is to alleviate start-up costs of trade-based work, enabling residents who might not otherwise have access to tools to pursue projects and careers in home repair, carpentry, metalworking, and automotive repair. Recently relocated to The Overlook Community Center, a larger, more centrally-located building, the GCMT plans to expand our modest lending program into workshop space with skillshare programming, trades training, and volunteer-supervised shop time modeled after the Bloomington Community Bike Project, a CSL project with 20 years of community service.

JHSSF funding will facilitate major renovations required to expand our programming and outreach. Once renovated, The Overlook Community Center will be positioned to realize Glenn's vision of building self-sufficiency among people facing economic instability, empowering those who have experienced addiction, homelessness, or incarceration, in particular. To wit, The Overlook Community Center established a referral network with Made Up Mind, the Indiana Recovery Alliance, New Leaf New Life, Shalom Center, and Mother Hubbard's Cupboard, who will recommend their clientele to our programs.

Address where project will be housed:

The Overlook Community Center,
611 W. 12th 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 to capital improvements to real estate and if you do not own the property at which the project 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 Overlook Community Center was purchased in 2017 with CSL funds and fundraised money. As of 2019, the property is held by a land trust, where the CSL is the beneficiary of the trust.

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

If "no," please explain:

The property is grandfathered under a "commercial other" zone designation, which allows us to continue its use as a workshop, which it was originally built for.

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.

We require a permit from the City of Bloomington for a connection to sanitary sewer and water, and for excavation to run the connection to the building. Due to costs associated with acquiring a permit, we will initiate the permitting process upon confirmation of funding. We estimate that acquiring a permit will take one month.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

Made Up Mind, Inc (MUM)

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

Collaborative: Center for Sustainable Living and Made Up Mind

The Center for Sustainable Living believes “Equity” to be a pivotal but often-missed component of the “Sustainability Tripod,” while M.U.M.’s program clients are socially and economically disadvantaged, deeply in need of the Equity that true Sustainability demands. Glenn Carter, himself, experienced – and recovered from – addiction, incarceration, and poverty, and we know his wish would be for his tools to help others recover from these struggles, just as they offered *him* a new life path. Hence, the substance of this partnership is mutual cooperation and coordination of a part-time, temporary staffing position – to be filled by a M.U.M. program client – for the operation and management of the tool library housed at The Overlook Community Center, a multi-use community space and tool library owned/held, in trust, by the Center for Sustainable Living. The Center for Sustainable Living and M.U.M. mutually understand and enthusiastically agree to a joint pursuit of Jack Hopkins Social Services grant funding, pursuant to the substance of this partnership. The Center for Sustainable Living will provide the space, equipment, materials, and training, and will administer the funding, while M.U.M. will provide a program client suitable to the part-time, temporary staffing position, assist in their guidance/evaluation, and any recommended, supplementary training.

PROJECT COSTS

Is this request for operational funds? Yes No

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

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*):

We were awarded a Sofia Travis grant in the amount of \$1,950.

We are in the process of finalizing the paperwork to be awarded a façade grant through Bloomington Urban Enterprise Association, in the amount of \$10,000.

We will be applying for funding through the Community Foundations. During a meeting with Marcus Whited from the Community Foundation, the CSL was encouraged to apply for funding to support through their smaller advisory funds. Marcus was emphatic that our organization is a good match for the kind of projects that the Community Foundation is looking to support.

The Trashion/Refashion show, our biggest annual fundraiser, will take place during April 7. We expect that half of the revenue from this event (about \$1500) will be allocated towards Overlook’s renovations.

We share the space with other local agencies, and we expect that these agencies will continue to contribute towards helping us upgrade the building with the aim of improving our shared space.

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

Our organization cannot upfront all of the costs that we outline in this application, therefore, the CSL would be able to upfront the cost of paying staff salary, and would submit reimbursement requests on a monthly basis, for 4 consecutive months. We would submit requests for City to Pay for the various costs associated with the water/sewer hook-up.

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

The completion of the sewer and water connection, and bathroom, do not depend on other anticipated funding and, therefore, this portion of the project would be completed as soon as JHSS funding became available. While the functioning and expansion of the Toolshare does depend on the addition of a bathroom and a water connection, it does not depend on the completion of other renovations that we have planned for the building.

FISCAL LEVERAGING (100 words or less)

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

Affordable space that is centrally located in the Bloomington area is scarce. The Overlook Community Center minimizes operating costs with a large team of dedicated volunteers. As a project of the CSL, the Overlook Community Center receives valuable resources such as liability insurance, banking and financial management software, website/IT consulting, and administrative support. Our new permanent home relieves us of rental costs and, hence, capital investments in the Overlook Community Center’s facilities will have long-lasting value. Not only the GCMT benefits from the renovations, but so do all CSL Projects, in addition to other local organizations with whom we share the space, at no cost. The Overlook Community Center will continue to leverage both monetary donations and in-kind donations of building materials, tools, and equipment.

FUNDING PRIORITIES -- RANKED

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

Yes No

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

| | Item | Cost |
|-------------|---|-----------------|
| Priority #1 | Domestic Water Service Fee | \$3,300 |
| | Sewer Connection Fee | \$2,775 |
| | Cut and excavate ground for proper tie ins to domestic water main and sanitary sewer main under 12th Street. Furnish and install all necessary piping between main in street and new fixtures inside the building | \$16,750 |
| | 4 months of salary @ \$15 an hour + taxes, 15 hours per week | \$4,032 |
| | Total Requested | \$32,517 |
| Priority #2 | Cut and excavate ground for proper tie ins to domestic water main and sanitary sewer main under 12th Street. Furnish and install all necessary piping between main in street and new fixtures inside the building | \$16,750 |
| | 4 months of salary @ \$15 an hour + taxes, 15 hours per week | \$4,032 |

| | | |
|-------------|---|-----------------|
| | Total Requested | \$20,782 |
| Priority #3 | Domestic Water Service Fee | \$3,300 |
| | Sewer Connection Fee | \$2,775 |
| | 4 months of salary @ \$15 an hour + taxes, 15 hours per week | \$4,032 |
| | Total Requested | \$10,107 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2012 SCAN noted Housing Quality as a barrier to economic stability, noting that 65% of households with income less than \$15,001 report that their home needs major repairs, and that homeowners often postpone small repairs until they aggregate, requiring costly major repairs later. The GCMT's expanded programming will increase low-income homeowners' economic stability by providing knowledge and tools necessary to complete basic home repairs and prevent their aggregation. This also complements Strategy 2 in the SCAN 2015-2019 Consolidated Plan, which aims to "[i]mprove existing owner-occupied structures for low- to moderate-income individuals/families" (86), by producing repair self-sufficiency.

In addition, the GCMT will proliferate vocational skills in carpentry, metalworking, and automotive repair. Guided and independent opportunities to learn trade skills, offered free-of-cost, will alleviate economic barriers to vocational education. Our targeted outreach to low-income homeowners, people experiencing homelessness, and people re-entering from jail or prison will ensure that The Overlook Community Center reaches people faced with economic instability. These efforts are consistent with SCAN's emphasis on employment, with the Business Outlook Panel's projection that construction and trade jobs will increase (70), and with the identification of adequate job training as a major barrier to economic stability in low-income households (72).

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

Water and sewer hook-up and the installation of a ADA-compliant bathroom are both permanent, one-time renovations that will greatly expand The Overlook Community Center's capacity to continue renovations, provide educational programming, and host regular volunteer-supervised workshop open hours.

The piloting of a temporary staff position is a one-time investment to help accelerate usability of the space by group members, neighbors, and area residents in need. Further, we wish this role to be filled by a client of M.U.M. because we want to prioritize empowering at-risk demographics and, hence, staffing by a M.U.M client (a) makes the space more inviting and unembarrassing for at-risk demographics, (b) provides us with day-to-day operational feedback from a staffer familiar with our prospective user-base, (c) allows us to test-run a longer-term staffing partnership with M.U.M., helping us to guide our strategic partnership aims and long-term investment plans. Once fully implemented, the space could easily be maintained by volunteers; however, we have confidence that our preference, upon evaluation of the pilot, would be for a longer-term, self-sufficient staffing partnership with M.U.M.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

The Overlook Community Center is at a pivotal point in our organization's development. The completion of our new permanent space in the Maple Heights neighborhood will allow us to:

- Reduce monthly expenses associated with rent.
- Invest in long-term projects that require permanent modifications to the building.
- Host repeating workshops that accommodate all skill levels.
- Develop a modular workshop space that welcomes many trades and crafts that benefit from shared tools and supplies.
- Address sustainability through self-sufficiency and community interdependence.
- Become a landing place for people re-entering the workforce from incarceration who worked in the trades but may have lost tools due to incarceration.

As an organization that has been active in Bloomington since 1992, the CSL has demonstrated its commitment to support and maintain long-lasting projects with long-term benefits. Our oldest project, the Community Bike Project, helps hundreds of people build self-sufficiency and hands-on bike maintenance skills each year. The Bike Project has become one of Bloomington's welcoming landmarks, and we envision the Toolshare workshop as a meeting space for local craft and tradespeople, people seeking to acquire trades skills, and those needing vocational training to increase their quality of life.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to

the improved service or facility.

The Toolshare component of the Overlook Community Center will measure its success by surveying the growth of the tool lending program and the impact of trades-skill training on Toolshare participants. Metrics will include:

- Total active members of the Toolshare
- Number of tools lent
- Number of people trained on specialized tools
- Total attendees of GCMT classes and workshops
- Toolshare involvement follow-up
- Assessment of barriers to employment in trade-based jobs
- Estimated home-repair and job-related costs alleviated through Toolshare involvement

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 realistically envision the role of the Toolshare and the Overlook Community Center as it will be embedded in the Bloomington community, we report data from Bloomington's kitchen and yard toolshare (The Hub Tool Share at Mother Hubbard's Cupboard's) and another regional tool library situated in a midwestern city of comparable size (The Tool Library in Bloomington, Illinois):

The Mother Hubbard's Cupboard Hub Tool Share:

- Bloomington's first kitchen and yard tool share was launched in March of 2014.
- Since its launch, MHC's tool library has enrolled 360 members and has loaned 707 tools. This is despite the fact that the Hub Tool Share was not actively staffed and advertised during its first year and a half, as explained to us by former MHC volunteer coordinator, Stephanie Solomon.
- In 2015, GCMT and The Hub established an agreement in which kitchen and gardening tools donated to GCMT would be forwarded to The Hub. Likewise trades tools donated to MHC, would be forwarded to GCMT. This agreement ensures that The Hub Tool Share and the GCMT are distinct organizations that serve different community needs.

The Tool Library (Bloomington, IL):

- Bloomington, Illinois population is comparable to Bloomington, Indiana, with a population of ~79,000 residents.
- Library was created in 2013, started with 100 tools in a small room.
- Within 3 years, the library had 1000 tools, and 750 members and has loaned 3600 tools.
- Hosts a variety of free home improvement workshops to help educate and empower people to maintain and improve their properties.
- Tool Library Director Ryan Heeren says the library has created a sense of pride over the years.
- Future plans for the library include partnering with Connect Transit to help build benches for all of the West Side's bus stops.

The Overlook Community Center Program Budget (a Project)

| Budget Line Items | Total Cost | Leveraged Funds |
|--|--------------------|-----------------|
| 1. Building cost | | |
| Property purchase cost | \$30,000.00 | \$30,000.00 |
| Total: | | |
| 2. Building upgrades | | |
| Picnic tables and bulletin board | \$1,500.00 | \$1,500.00 |
| Landscaping work, regrading land | \$1,700.00 | \$1,700.00 |
| Removed old insulation from attic and add new | \$500.00 | \$500.00 |
| New Roof | \$10,000.00 | \$0.00 |
| Historic Facade Preservation Grant through Bloom | \$10,000.00 | \$10,000.00 |
| Shed for Indiana Recovery Alliance | \$4,000.00 | |
| Shed for Midwest Pages to Prisoners | \$6,000.00 | \$6,000.00 |
| Green house for community garden | \$2,000.00 | |
| Construction supplies to remodel front room | \$3,000.00 | \$2,500.00 |
| Architect design for shared spaces in building | \$2,800.00 | \$1,800.00 |
| Re-framing middle section of the building | \$20,000.00 | \$6,200.00 |
| Water hookup fee | \$3,300.00 | |
| Sewer hookup fee | \$2,775.00 | |
| Cut and excavate ground for proper tie-ins to domestic water main and sanitary sewer main under 12th Street. Furnish and install all necessary sanitary sewer piping between main in street and new fixtures inside the building. Furnish and install all necessary domestic water piping between new water meter and new fixtures inside the building | \$16,750.00 | |
| Finishing of ADA compliant bathroom | \$5,660.00 | |
| Total: | \$89,985.00 | \$13,700.00 |
| 3. ToolShare operating expenses | | |
| Salary for staff – 4 months, 15 hours per week | \$4,032.00 | 4 months |
| Utilities (electricity – annual) | \$1,200.00 | |
| Supplies for tool maintenance and repair | \$500.00 | |
| Materials for workshops | \$250.00 | |
| Total: | \$5,982.00 | |
| Overall total cost | \$95,967.00 | |

Table 1. Value of Volunteer Hours already donated to the project

| Task | volunteer hours | Total Value |
|--|-----------------|-------------|
| Building upgrades | | |
| Picnic tables and bulletin board build | 120 | \$2,520.00 |

Collaborative: Center for Sustainable Living and Made Up Mind

| | | |
|---|------------|--------------------|
| Cleaning of site and removal of debris | 200 | \$4,200.00 |
| Removal of old insulation | 40 | \$840.00 |
| Fixing electric installation | 15 | \$315.00 |
| Removal of invasive plant species and landscaping | 100 | \$2,100.00 |
| Removal of broken windows and glass | 10 | \$210.00 |
| French drain to relieve humidity in building | 75 | \$1,575.00 |
| Moving tools from old CSL building to Overlook | 30 | \$630.00 |
| Organizing tools and building shelves for tools | 50 | \$1,050.00 |
| Organizing books in shed | 70 | \$1,470.00 |
| Building and fixing shelves | 80 | \$1,680.00 |
| Painting interiors | 40 | \$840.00 |
| Transporting and building green house | 40 | \$840.00 |
| Workshops | 45 | \$945.00 |
| Cleaning, organizing tools | 80 | \$1,680.00 |
| ToolShare operations | 640 | \$20,895.00 |

* Note that volunteer hours are valued at the Indiana volunteer rate of \$21

Cost of the Center for Sustainable Living)

| In-Kind | J. Hopkins Grant Request |
|---|--------------------------|
| N/A | \$0.00 |
| | \$0.00 |
| 2 trees | \$0.00 |
| | \$0.00 |
| | \$0.00 |
| | \$0.00 |
| | \$0.00 |
| | \$0.00 |
| donated by Mother Hubbards Cupboard | \$0.00 |
| | \$0.00 |
| architect donated 1/3 of time | \$0.00 |
| \$5000 in labor hours | \$0.00 |
| | \$3,300.00 |
| | \$2,775.00 |
| | \$16,750.00 |
| | \$5,660.00 |
| | \$28,485.00 |
| | 4032 |
| We expect to get most materials donated | 0 |
| | \$4,032.00 |
| | \$32,517.00 |

Table 2. Value of Volunteer Hours to be expected in 2019

| Task | volunteer hours |
|--------------------------|-----------------|
| Building upgrades | |
| Re-framing work | 240 |

Collaborative: Center for Sustainable Living and Made Up Mind

| | |
|---|----|
| inventory of tools | 50 |
| labeling of all tools | 20 |
| Organizing 2019 workshops in partnership with | 40 |
| Conducting Workshops | 40 |
| Partner organizations coordination | 20 |

| | |
|-----------------------------|------------|
| ToolShare operations | 410 |
|-----------------------------|------------|

| |
|--------------------|
| Total Value |
| \$5,040.00 |

\$1,050.00
\$420.00
\$840.00
\$840.00
\$420.00

\$8,610.00

Memorandum of Understanding between Center for Sustainable Living and Made Up Mind, Inc.

On this ___ Day of _____, 2019, the Center for Sustainable Living and Made Up Mind, Inc. hereby mutually understand and agree to a limited partnership pursuant to the fulfillment of the respective missions of these organizations. Center for Sustainable Living believes “Equity” to be a pivotal but often-missed component of the “Sustainability Tripod,” while M.U.M.’s program clients are socially and economically disadvantaged, in need of the Equity that true Sustainability demands.

The substance of this partnership is mutual cooperation and coordination of a part-time, temporary staffing position – to be filled by a M.U.M. program client – for the operation and management of the tool library housed at The Overlook Community Center, a multi-use community space and tool library owned/held, in trust, by the Center for Sustainable Living. Center for Sustainable Living and M.U.M. mutually understand and enthusiastically agree to a joint pursuit of Jack Hopkins Social Services grant funding, pursuant to the substance of this partnership. *Center for Sustainable Living will provide the space, equipment, materials, and training, and will administer the funding, while M.U.M. will provide a program client suitable to the part-time, temporary staffing position and any recommended, supplementary training.



Andrea Avena Koenigsberger
Board President – Center for Sustainable Living

Date: March 29, 2019



Ana Bouwkamp
Board President – Made Up Mind, Inc.

Date: March 29, 2019

Form **990**
 Department of the Treasury
 Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.
 ▶ Information about Form 990 and its instructions is at www.irs.gov/form990.

2016
Open to Public Inspection

A For the 2016 calendar year, or tax year beginning _____, and ending _____

B Check if applicable:
 Address change
 Name change
 Initial return
 Final return/terminated
 Amended return
 Application pending

C Name of organization
CENTER FOR SUSTAINABLE LIVING INC

Doing business as _____

Number and street (or P.O. box if mail is not delivered to street address) Room/suite
PO BOX 1665

City or town, state or province, country, and ZIP or foreign postal code
BLOOMINGTON IN 47402

D Employer identification number
31-1074237

E Telephone number
812-269-6109

F Name and address of principal officer:
RYAN CONWAY
PO BOX 1665
BLOOMINGTON IN 47402

G Gross receipts \$ **190,264**

H(a) Is this a group return for subordinates? Yes No
H(b) Are all subordinates included? Yes No
 If "No," attach a list. (see instructions)

I Tax-exempt status: 501(c)(3) 501(c) () (insert no.) 4947(a)(1) or 527

J Website: ▶ **HTTPS://WWW.SIMPLYCSL.ORG**

K Form of organization: Corporation Trust Association Other ▶

L Year of formation: **1983** **M** State of legal domicile: **IN**

| Part I Summary | | Prior Year | Current Year |
|--|---|-------------------------------------|------------------------|
| Activities & Governance | 1 Briefly describe the organization's mission or most significant activities. EDUCATION AND GENERAL IMPROVEMENT OF THE ENVIRONMENT. | | |
| | 2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets. | | |
| | 3 Number of voting members of the governing body (Part VI, line 1a) | 3 | 3 |
| | 4 Number of independent voting members of the governing body (Part VI, line 1b) | 4 | 3 |
| | 5 Total number of individuals employed in calendar year 2016 (Part V, line 2a) | 5 | 0 |
| | 6 Total number of volunteers (estimate if necessary) | 6 | 0 |
| | 7a Total unrelated business revenue from Part VIII, column (C), line 12 | 7a | 0 |
| 7b Net unrelated business taxable income from Form 990-T, line 34 | 7b | 0 | |
| Revenue | 8 Contributions and grants (Part VIII, line 1h) | | 136,233 |
| | 9 Program service revenue (Part VIII, line 2g) | | 54,031 |
| | 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) | | 0 |
| | 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | | 0 |
| | 12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) | | 190,264 |
| Expenses | 13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) | | 100,589 |
| | 14 Benefits paid to or for members (Part IX, column (A), line 4) | | 0 |
| | 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | | 0 |
| | 16a Professional fundraising fees (Part IX, column (A), line 11e) | | 0 |
| | b Total fundraising expenses (Part IX, column (D), line 25) ▶ | 0 | |
| | 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) | | 69,004 |
| 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | | 169,593 | |
| 19 Revenue less expenses. Subtract line 18 from line 12 | | 20,671 | |
| Net Assets or Fund Balances | 20 Total assets (Part X, line 16) | Beginning of Current Year 86,416 | End of Year 107,087 |
| | 21 Total liabilities (Part X, line 26) | 0 | 0 |
| | 22 Net assets or fund balances. Subtract line 21 from line 20 | 86,416 | 107,087 |

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.

Sign Here Signature of officer: **ANN WATZEL** Date: _____
 Type or print name and title: **TREASURER**

Paid Preparer Use Only

Print/Type preparer's name: **David Sare** Preparer's signature: **David Sare** Date: **11/15/17** Check if self-employed PTIN: **P01398345**

Firm's name: ▶ **Sare Associates, P.C.** Firm's EIN: ▶ **35-1845142**

Firm's address: ▶ **4327 E 3rd Bloomington, IN 47401-5551** Phone no.: **812-339-9330**

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:

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 \$ **107,818** including grants of \$ **100,589**) (Revenue \$)
EDUCATION AND GENERAL IMPROVEMENT OF THE ENVIRONMENT.

4b (Code:) (Expenses \$ **19,098** including grants of \$) (Revenue \$)
HEALTHFUL FOOD FOR ALL

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O.)
(Expenses \$ **42,677** including grants of \$) (Revenue \$)

4e Total program service expenses **169,593**

Part IV Checklist of Required Schedules

| | Yes | No |
|---|-----|----|
| 1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A | X | |
| 2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? | X | |
| 3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I | | X |
| 4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II | | X |
| 5 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? If "Yes," complete Schedule C, Part III | | X |
| 6 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? If "Yes," complete Schedule D, Part I | | X |
| 7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II | | X |
| 8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III | | X |
| 9 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? If "Yes," complete Schedule D, Part IV | | X |
| 10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V | | X |
| 11 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. | | |
| a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI | | X |
| 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? If "Yes," complete Schedule D, Part VII | | X |
| c 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? If "Yes," complete Schedule D, Part VIII | | X |
| d 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? If "Yes," complete Schedule D, Part IX | | X |
| e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X | | X |
| f 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)? If "Yes," complete Schedule D, Part X | | X |
| 12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII | | X |
| b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional | | X |
| 13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | | X |
| 14a Did the organization maintain an office, employees, or agents outside of the United States? | | X |
| 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? If "Yes," complete Schedule F, Parts I and IV | | X |
| 15 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? If "Yes," complete Schedule F, Parts II and IV | | X |
| 16 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? If "Yes," complete Schedule F, Parts III and IV | | X |
| 17 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? If "Yes," complete Schedule G, Part I (see instructions) | | X |
| 18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II | | X |
| 19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III | | X |

Part IV Checklist of Required Schedules (continued)

| | Yes | No |
|--|----------|----------|
| 20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> | | X |
| b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? | | |
| 21 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 | |
| 22 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 |
| 23 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 |
| 24a 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 "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> | | X |
| b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | | |
| c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? | | |
| d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? | | |
| 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. 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 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 |
| 26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i> | | X |
| 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> | | X |
| 28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): | | |
| a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> | | X |
| b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> | | X |
| c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> | | X |
| 29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> | | X |
| 30 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 |
| 31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> | | X |
| 32 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 |
| 33 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 |
| 34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, or IV, and Part V, line 1</i> | | X |
| 35a Did the organization have a controlled entity within the meaning of section 512(b)(13)? | | X |
| 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> | | |
| 36 Section 501(c)(3) organizations. 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 |
| 37 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 |
| 38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. 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 |
|------------|--|----------|----------|
| 1a | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable | | |
| 1b | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable | | |
| 1c | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? | X | |
| 2a | 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 | | |
| 2b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions) | | |
| 3a | Did the organization have unrelated business gross income of \$1,000 or more during the year? | | X |
| 3b | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O | | |
| 4a | 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 |
| 4b | 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). | | |
| 5a | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | | X |
| 5b | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | | X |
| 5c | If "Yes" to line 5a or 5b, did the organization file Form 8886-T? | | |
| 6a | 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 |
| 6b | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? | | |
| 7 | Organizations that may receive deductible contributions under section 170(c). | | |
| 7a | 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? | | |
| 7b | If "Yes," did the organization notify the donor of the value of the goods or services provided? | | |
| 7c | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? | | |
| 7d | If "Yes," indicate the number of Forms 8282 filed during the year | | |
| 7e | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | | |
| 7f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | |
| 7g | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? | | |
| 7h | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? | | |
| 8 | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? | | |
| 9 | Sponsoring organizations maintaining donor advised funds. | | |
| 9a | Did the sponsoring organization make any taxable distributions under section 4966? | | |
| 9b | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | | |
| 10 | Section 501(c)(7) organizations. Enter: | | |
| 10a | Initiation fees and capital contributions included on Part VIII, line 12 | | |
| 10b | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities | | |
| 11 | Section 501(c)(12) organizations. Enter: | | |
| 11a | Gross income from members or shareholders | | |
| 11b | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.) | | |
| 12a | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? | | X |
| 12b | If "Yes," enter the amount of tax-exempt interest received or accrued during the year | | |
| 13 | Section 501(c)(29) qualified nonprofit health insurance issuers. | | |
| 13a | Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O. | | |
| 13b | 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 | | |
| 13c | Enter the amount of reserves on hand | | |
| 14a | Did the organization receive any payments for indoor tanning services during the tax year? | | X |
| 14b | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O | | |

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 in 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 |
|----|---|-----|----|
| 1a | 3 | | |
| 1b | 3 | | |
| 2 | | | X |
| 3 | | | X |
| 4 | | | X |
| 5 | | | X |
| 6 | | | X |
| 7a | | | X |
| 7b | | | X |
| 8 | | | |
| 8a | | X | |
| 8b | | X | |
| 9 | | | X |

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

| | | Yes | No |
|-----|--|-----|----|
| 10a | | | X |
| 10b | | | |
| 11a | | | X |
| 12a | | | X |
| 12b | | | |
| 12c | | | |
| 13 | | | X |
| 14 | | | X |
| 15a | | | X |
| 15b | | | X |
| 16a | | | X |
| 16b | | | |

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed **None**
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 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 in Schedule O)
- 19 Describe in 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.
- 20 State the name, address, and telephone number of the person who possesses the organization's books and records: **▶**

ANN WATZEL 112 S MORNINGSIDE DR IN 47408 812-269-6109
BLOOMINGTON

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 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 and/or Box 7 of Form 1099-MISC) 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.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

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) | (E) Reportable compensation from related organizations (W-2/1099-MISC) | (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) RHONDA BAIRD PRESIDENT | 0.00 0.00 | | | X | | | | 0 | 0 | 0 |
| (2) RYAN CONWAY BOARD SECRETARY | 0.00 0.00 | | | X | | | | 0 | 0 | 0 |
| (3) ANN WATZEL TREASURER | 0.00 0.00 | | | X | | | | 0 | 0 | 0 |
| (4) | | | | | | | | | | |
| (5) | | | | | | | | | | |
| (6) | | | | | | | | | | |
| (7) | | | | | | | | | | |
| (8) | | | | | | | | | | |
| (9) | | | | | | | | | | |
| (10) | | | | | | | | | | |
| (11) | | | | | | | | | | |

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 | |
|--|---|--|--|---|--|--------|
| Contributions, Gifts, Grants and Other Similar Amounts | 1a Federated campaigns | 1a | | | | |
| | b Membership dues | 1b | | | | |
| | c Fundraising events | 1c | | | | |
| | d Related organizations | 1d | | | | |
| | e Government grants (contributions) | 1e | 99,989 | | | |
| | f All other contributions, gifts, grants, and similar amounts not included above | 1f | 36,244 | | | |
| | g Noncash contributions included in lines 1a-1f \$ | | | | | |
| | h Total. Add lines 1a-1f | | 136,233 | | | |
| | Program Service Revenue | 2a WORKSHOPS/EVENTS | Busn. Code | 20,899 | | 20,899 |
| b WINTER FARMERS MARKET | | | 16,706 | | 16,706 | |
| c BIKE PROJECT | | | 16,426 | | 16,426 | |
| d | | | | | | |
| e | | | | | | |
| f All other program service revenue | | | | | | |
| g Total. Add lines 2a-2f | | | 54,031 | | | |
| Other Revenue | | 3 Investment income (including dividends, interest, and other similar amounts) | | | | |
| | 4 Income from investment of tax-exempt bond proceeds | | | | | |
| | 5 Royalties | | | | | |
| | 6a Gross rents | (i) Real | | | | |
| | | (ii) Personal | | | | |
| | | b Less: rental exps. | | | | |
| | | c Rental inc. or (loss) | | | | |
| | d Net rental income or (loss) | | | | | |
| | 7a Gross amount from sales of assets other than inventory | (i) Securities | | | | |
| | | (ii) Other | | | | |
| | | b Less: cost or other basis & sales exps. | | | | |
| | | c Gain or (loss) | | | | |
| | d Net gain or (loss) | | | | | |
| | 8a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18 | a | | | | |
| | | b Less: direct expenses | b | | | |
| c Net income or (loss) from fundraising events | | | | | | |
| 9a Gross income from gaming activities. See Part IV, line 19 | a | | | | | |
| | b Less: direct expenses | b | | | | |
| | c Net income or (loss) from gaming activities | | | | | |
| 10a Gross sales of inventory, less returns and allowances | a | | | | | |
| | b Less: cost of goods sold | b | | | | |
| | c Net income or (loss) from sales of inventory | | | | | |
| Miscellaneous Revenue | | Busn. Code | | | | |
| 11a | b | | | | | |
| | c | | | | | |
| | d All other revenue | | | | | |
| | e Total. Add lines 11a-11d | | | | | |
| | 12 Total revenue. See instructions | | 190,264 | 0 | 0 | 54,031 |

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

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII. | (A) Total expenses | (B) Program service expenses | (C) Management and general expenses | (D) Fundraising expenses |
|--|-----------------------|---------------------------------|--|-----------------------------|
| 1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 | 100,589 | 100,589 | | |
| 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 | | | | |
| 6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | | | | |
| 7 Other salaries and wages | | | | |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) | | | | |
| 9 Other employee benefits | | | | |
| 10 Payroll taxes | | | | |
| 11 Fees for services (non-employees): | | | | |
| 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.) | | | | |
| 12 Advertising and promotion | | | | |
| 13 Office expenses | 1,609 | 1,609 | | |
| 14 Information technology | 413 | 413 | | |
| 15 Royalties | | | | |
| 16 Occupancy | 3,000 | 3,000 | | |
| 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 | 521 | 521 | | |
| 24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.) | | | | |
| a COGS | 42,677 | 42,677 | | |
| b FOOD COSTS | 18,558 | 18,558 | | |
| c SUPPLIES | 1,348 | 1,348 | | |
| d MISCELLANEOUS | 733 | 733 | | |
| e All other expenses | 145 | 145 | | |
| 25 Total functional expenses. Add lines 1 through 24e | 169,593 | 169,593 | 0 | 0 |
| 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 | |
|------------------------------------|--|---|--------|--------------------|---------|
| Assets | 1 | Cash—non-interest bearing | 86,416 | 1 | 107,087 |
| | 2 | Savings and temporary cash investments | | 2 | |
| | 3 | Pledges and grants receivable, net | | 3 | |
| | 4 | Accounts receivable, net | | 4 | |
| | 5 | Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L | | 5 | |
| | 6 | Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L | | 6 | |
| | 7 | Notes and loans receivable, net | | 7 | |
| | 8 | Inventories for sale or use | | 8 | |
| | 9 | Prepaid expenses and deferred charges | | 9 | |
| | 10a | Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D | 10a | | |
| | b | Less: accumulated depreciation | 10b | 10c | |
| | 11 | Investments—publicly traded securities | | 11 | |
| | 12 | Investments—other securities. See Part IV, line 11 | | 12 | |
| | 13 | Investments—program-related. See Part IV, line 11 | | 13 | |
| | 14 | Intangible assets | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | | 15 | |
| 16 | Total assets. Add lines 1 through 15 (must equal line 34) | 86,416 | 16 | 107,087 | |
| Liabilities | 17 | Accounts payable and accrued expenses | | 17 | |
| | 18 | Grants payable | | 18 | |
| | 19 | Deferred revenue | | 19 | |
| | 20 | Tax-exempt bond liabilities | | 20 | |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D | | 21 | |
| | 22 | Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L | | 22 | |
| | 23 | Secured mortgages and notes payable to unrelated third parties | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated third parties | | 24 | |
| | 25 | 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 | | 25 | |
| | 26 | Total liabilities. Add lines 17 through 25 | | 0 | 0 |
| Net Assets or Fund Balances | Organizations that follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34. | | | | |
| | 27 | Unrestricted net assets | | 27 | |
| | 28 | Temporarily restricted net assets | | 28 | |
| | 29 | Permanently restricted net assets | | 29 | |
| | Organizations that do not follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 30 through 34. | | | | |
| | 30 | Capital stock or trust principal, or current funds | | 30 | |
| | 31 | Paid-in or capital surplus, or land, building, or equipment fund | | 31 | |
| | 32 | Retained earnings, endowment, accumulated income, or other funds | 86,416 | 32 | 107,087 |
| 33 | Total net assets or fund balances | 86,416 | 33 | 107,087 | |
| 34 | Total liabilities and net assets/fund balances | 86,416 | 34 | 107,087 | |

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

| | | | |
|----|--|----|---------|
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | 190,264 |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 169,593 |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | 20,671 |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) | 4 | 86,416 |
| 5 | Net unrealized gains (losses) on investments | 5 | |
| 6 | Donated services and use of facilities | 6 | |
| 7 | Investment expenses | 7 | |
| 8 | Prior period adjustments | 8 | |
| 9 | Other changes in net assets or fund balances (explain in Schedule O) | 9 | |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B)) | 10 | 107,087 |

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

- 1 Accounting method used to prepare the Form 990: Cash Accrual Other
 If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a 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:
 Separate basis Consolidated basis Both consolidated and separate basis
- 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:
 Separate basis Consolidated basis Both consolidated and separate basis
- c 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 in Schedule O.
- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- 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 in Schedule O and describe any steps taken to undergo such audits.

| | Yes | No |
|----|-----|----|
| 2a | | X |
| 2b | | X |
| 2c | | |
| 3a | | |
| 3b | | |

Collaborative: Center for Sustainable Living and Made Up Mind

Indiana Department of Revenue

Check if: Change of Address

NP-20

State Form 51062 (R7 / B-13)

Indiana Nonprofit Organization's Annual Report

For the Calendar Year or Fiscal Year

Beginning 01 01 2016 and Ending 12 31 2016

MM/DD/YYYY

MM/DD/YYYY

Amended Report
Final Report: Indicate Date Closed

Due on the 15th day of the 5th month following the end of the tax year.
NO FEE REQUIRED.

Name of Organization

CENTER FOR SUSTAINABLE LIVING INC

Telephone Number

812 269 6109

Address

PO BOX 1665

County

MONROE

Indiana Taxpayer Identification Number

City

BLOOMINGTON

State

IN

Zip Code

47402

Federal Identification Number

31 1074237

Printed Name of Person to Contact

ANN WATZEL

Contact's Telephone Number

812 964 3571

If you are filing a federal return, attach a completed copy of Form 990, 990EZ, or 990PF.

Note: If your organization has unrelated business income of more than \$1,000 as defined under Section 513 of the Internal Revenue Code, you must also file Form IT-20NP.

Current Information

1. Have any changes not previously reported to the Department been made in your governing instruments, (e.g.) articles of incorporation, bylaws, or other instruments of similar importance? If yes, attach a detailed description of changes.
2. Indicate number of years your organization has been in continuous existence. 34
3. Attach a schedule, listing the names, titles and addresses of your current officers. SEE STATEMENT 1
4. Briefly describe the purpose or mission of your organization below.

EDUCATION AND GENERAL IMPROVEMENT OF THE ENVIRONMENT.

Email Address: AWATZEL@GMAIL.COM

I declare under the penalties of perjury that I have examined this return, including all attachments, and to the best of my knowledge and belief, it is true, complete, and correct.

Signature of Officer or Trustee

ANN WATZEL

Name of Person(s) to Contact

TREASURER

Title

Date

812 269 6109

Daytime Telephone Number

Important: Please submit this completed form and/or extension to:

Indiana Department of Revenue, Tax Administration

P.O. Box 6481

Indianapolis, IN 46206-6481

Telephone: (317) 232-0129

Extensions of Time to File

The Department recognizes the Internal Revenue Service application for automatic extension of time to file, Form 8868. Please forward a copy of your federal extension, identified with your Nonprofit Taxpayer Identification Number (TID), to the Indiana Department of Revenue, Tax Administration by the original due date to prevent cancellation of your sales tax exemption. Always indicate your Indiana Taxpayer Identification number on your request for an extension of time to file.

Reports post marked within thirty (30) days after the federal extension due date, as requested on Federal Form 8868, will be considered as timely filed. A copy of the federal extension must also be attached to the Indiana report. In the event that a federal extension is not needed, a taxpayer may request in writing an Indiana extension of time to file from the: Indiana Department of Revenue, Tax Administration, P.O. Box 6481, Indianapolis, IN 46206-6481, (317) 232-0129.

If Form NP-20 or extension is not timely filed, the taxpayer will be notified by the Department pursuant to I.C. 6-2.5-5-21(d), to file Form NP-20. If within sixty (60) days after receiving such notice the taxpayer does not file Form NP-20, the taxpayer's exemption from sales tax will be canceled.



25413111022

- 1.) The first Column & first two Rows of this sheet are locked to allow the headings and descriptions to always be displayed.
- 2.) This is a "STATIC copy" of the original dynamic Google Sheet "2017 Taxes Summary -All CSL Projects" the data for it had been pulled (via formula) from its enclosed Tabs corresponding to each Project's Annual Report.
- 3.) Any additional, supporting/Reference Data or Tabs for a given Annual Report are combined into a separate spreadsheet file "2017 Ref. Data -CSL Projects", available here:
https://docs.google.com/spreadsheets/d/1A3ZPUfnWqXRJUktYdZPohsHI_4nHwhO1tpE_KnuMJXc/edit?usp=sharing

1

2

| BCBP | BloomingVeg |
|--------------------------------------|-------------|
| PayPal Account Situation: None Found | √ None |

Beginning Balance: \$21,810.59 **\$0.00**

Reported TOTAL EXTERNAL INCOME figures: \$15,694.25

Reported TOTAL INTERNAL(LY Transferred) INCOME figures: \$500.00

Reported TOTAL INCOME figures: \$16,194.25

Reported TOTAL EXTERNAL EXPENSES figures: \$16,289.08

Reported TOTAL INTERNAL EXPENSES figures: \$736.63

Reported TOTAL EXPENSES figures: \$17,025.71

Reported NET PROFIT/(LOSS) -\$831.46 **\$0.00**

(Verification Calculations): -\$831.46 \$0.00

Ending Balance: \$20,979.13 **\$0.00**

(Verification Calculations): \$20,979.13 \$0.00

This project had no financial activity in 2017, so the opening and closing balances have been directly entered, as no Annual Report was submitted.

Comment(s):

3

4

5

7

8

| BWFM | BYBB | Carbon Xchange | Discardia | FoLM |
|-------------|-------------|-----------------------|------------------|--------------|
| √ Included | √ Included | √ None | √ via CSL-HQ | √ via CSL-HQ |

| | | | | |
|-------------|---------------|-------------------|------------|------------|
| \$21,781.40 | \$0.00 | \$1,450.00 | \$5,192.18 | \$0.00 |
| \$28,026.52 | \$85.97 | | \$2,245.00 | \$921.00 |
| | \$0.00 | | \$1,349.15 | \$115.39 |
| \$28,026.52 | \$85.97 | | \$3,594.15 | \$1,036.39 |
| | \$85.97 | | | |
| \$1,277.81 | \$0.00 | | | |
| \$19,186.76 | \$85.97 | | \$2,701.71 | \$173.02 |
| \$8,839.76 | \$0.00 | | \$892.44 | \$863.37 |
| \$8,839.76 | \$0.00 | \$0.00 | \$892.44 | \$863.37 |
| \$30,621.16 | \$0.00 | \$1,450.00 | \$6,084.62 | \$863.37 |
| \$30,621.16 | \$0.00 | \$1,450.00 | \$6,084.62 | \$863.37 |

Collaborative: Center for Sustainable Living and Made Up Mind

| | |
|---|--|
| This project was forming in 2017, so there was almost no financial activity, except one donation that was spent to buy sewing materials and tools for making the shopping bags. | This project had no financial activity in 2017, so the opening and closing balances have been directly entered, as no Annual Report was submitted. |
|---|--|

9 10 11 12 13

| GCMTS | Habitat Stewards | HFAF | OpenStreets | Overlook |
|------------|------------------|------------|-------------|------------|
| None Found | √ None | √ Included | None Found | √ Included |

\$7,117.09 **\$1,334.81** \$7,497.88 \$7,447.90 \$0.00

\$3,390.00 \$29,963.00 \$388.71 \$1,735.23

\$2,750.00

\$6,140.00 \$29,963.00 \$388.71 \$1,735.23

\$13,250.00 \$23,390.29 \$1,618.67 \$1,398.20

-\$7,110.00 **\$0.00** \$6,572.71 -\$1,229.96 \$337.03

-\$7,110.00 \$0.00 \$6,572.71 -\$1,229.96 \$337.03

\$7.09 **\$1,334.81** \$14,070.59 \$6,217.94 \$337.03

\$7.09 \$1,334.81 \$14,070.59 \$6,217.94 \$337.03

This project had no financial activity in 2017, so the opening and closing balances have been directly entered, as no Annual Report was submitted.

| 14 | 13 | | 14 | All Projects (su |
|------------------|---------------------|-----------------------------|------------|--------------------|
| ShareBloomington | SIREN √ Included | *SIREN dba SFA √ None | Trillium | |
| None Found | | | None Found | NA |
| \$809.36 | \$16,364.32 | \$0.00 | \$1,696.45 | \$92,501.98 |
| \$0.00 | \$1,074.10 | \$101.15 | \$10.00 | \$83,634.93 |
| \$0.00 | \$1,074.10 | \$101.15 | \$10.00 | \$4,714.54 |
| | | | | \$88,349.47 |
| | | | | \$16,375.05 |
| | | | | \$2,014.44 |
| \$780.00 | \$658.32 | \$0.00 | \$0.00 | \$80,268.65 |
| -\$780.00 | \$415.78 | \$101.15 | \$10.00 | \$8,080.82 |
| -\$780.00 | \$415.78 | \$101.15 | \$10.00 | \$8,080.82 |
| \$29.36 | \$16,145.60 | \$101.15 | \$1,706.45 | \$99,948.30 |
| \$29.36 | \$16,145.60 | \$101.15 | \$1,706.45 | \$99,948.30 |

| | |
|---|---|
| <p>NOTE: This calculation was edited to account for donations to SIREN via PayPal that remained on-deposit in the PayPal account at the end of 2017, so the donations can be reported in 2017 Income.</p> | <p>NOTE: This calculation was edited to account for donations to SIREN on behalf of SFA, and held in a separate account from SIREN's bank account) until ISFA could become its own project (in 2018). Since the SFA gift was received & acknowledged in 2017, SIREN is reporting it here...</p> |
|---|---|

\$0.00

15CSL-HQ
 ✓ via CSL-HQ

**All CSL,
 as a whole,
 including CSL-HQ**

PayPal complete

\$107,087.12

\$91,213.09

\$88,001.76

\$3,211.33

\$9,696.15

\$3,211.33

\$116,100.17

Cash in Bank
 from 2016 Tax
 Summary sheet
 \$ 107,087.12

+ \$14,585.14 =

↗ \$2,863.62 ↘

↗ \$23,569.33 ↘

+ ↗ \$26,432.95 ↘ =

↗ \$7,733.11 ↘

↗ \$17,084.51 ↘

+ ↗ \$24,817.62 ↘ =

↗ + -\$4,869.49 =

+ \$1,615.33 =

\$1,615.33

+ \$16,151.87 =

\$16,151.87

**Agrees w/
 2016 taxes!**

NOTE: This Reported NET PROFIT/(LOSS)

NOTE: This Reported NET PROFIT/(LOSS)

(Verification Calculations)

Matches all bank statement

(Verification Calculations)

Created a
balanced CSL-
HQ report based
on bank
statements and
Gnucash
reports.
-Done! ✓

NOTE: There are TWO Reported NET PROFIT/(LOSS) \ CSL-HQ, that are calculated based on different
»One set uses the CSL-HQ "**Reported TOTAL** Income : including pass-thru transfers of Project funds, per the gra
»The second set uses the "**Net, Incremental**, Reportab Expenses attributable to actual CSL-HQ activity, as shown figures.

value uses the Net, Incremental, Reportable I & E attributable to CSL-HQ.

value uses the Reported Total I & E for the CSL-HQ account.

balances!

/values shown for
sums.
and Expenses"
yed-out figures.
le Income and
i by the bold blue

Collaborative: Center for Sustainable Living and Made Up Mind

Proposal to:
Center for Sustainable Living
Email: sera.baghdadi@gmail.com

Proposal from:
Mike Langley exc.
555 E Wylie Rd.
Bloomington, IN 47408

The following bid proposal is to install a sewer lateral and waterline at 611 W 12th St Bloomington, IN. This proposal includes all labor, machinery, material, and trucking necessary for the job completion.

Scope of work:

Obtain permits from the city for street cuts and furnish city with a 10,000 street cut bond. This bid does not include any sewer hook on fees, water or meter hook on fees, or tapping fees, exc. This is to be paid for by others. Saw cut the street, excavate dirt for sewer line and install a new 6" sewer lateral from the main down the alley to approximately the middle of the building. Concrete and asphalt the street back, patch the street and driveway entrance back according to the city specs. Haul away any excess dirt. Cut street for water main tap. Dig up water main to be ready for the city to tap, the city will set new meter in the tree plot. After the meter is set Langley exc. will extend the waterline under the sidewalk and the limestone retaining wall. If the sidewalk is removed Langley exc. will patch it back as well as the street according to city specs. Any solid rock removal will be extra on a time and material basics agreed to at that time.

Payment terms: Payment in full among completion of job.

Total bid price: \$16,750.00

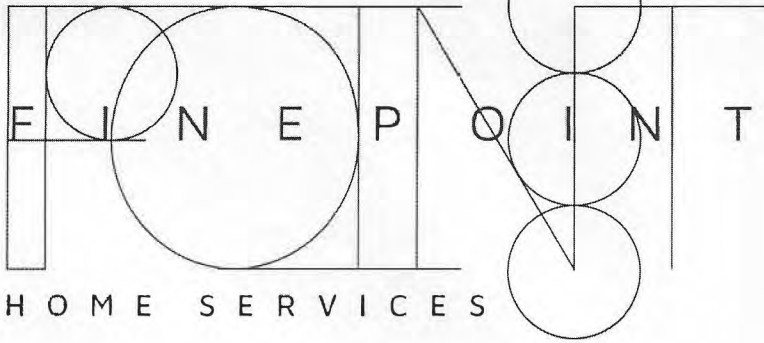
Sign for Proposal Acceptance:

X _____

Mike Langley

X _____

Center for Sustainable Living representative



THE OVERLOOK
611 WEST 12TH ST.
BLOOMINGTON, IN 47404

March 20, 2019

We hereby propose to furnish the materials and perform the labor necessary for the completion of:

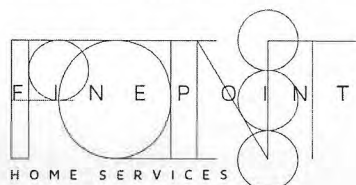
| SERVICE | Materials Cost | Labor Cost |
|---|----------------|------------|
| Framing and electrical rough-in | \$290 | \$650 |
| Drywall Installation and Finishing with Insulation installed on outside wall. | \$440 | \$1,150 |
| Trim and ADA Compliant door installed in bathroom entry | \$310 | \$430 |
| Prep and paint all trim, walls, ceiling and floor. | \$330 | \$550 |
| Electrical and additional plumbing work. | \$410 | \$1,100 |
| | Materials Cost | \$1,780 |
| | Labor Cost | \$3,880 |
| | Grand Total | \$5,660 |

All material is guaranteed to be as specified, and the above work to be performed in accordance with the drawings and specifications submitted for above work and completely in substantial workmanlike manner for the sum of \$5,660.

Thank you for giving us the opportunity to bid for your business. We look forward to showing you that our great reputation is well deserved!

Respectfully submitted,

Brandon Hood
Owner, Finepoint Home Services



931 W 6TH ST
BLOOMINGTON, IN
47404

PHONE (812)219.0847
EMAIL FinepointHomeServices@gmail.com
WEBSITE FinepointHomeServices.com

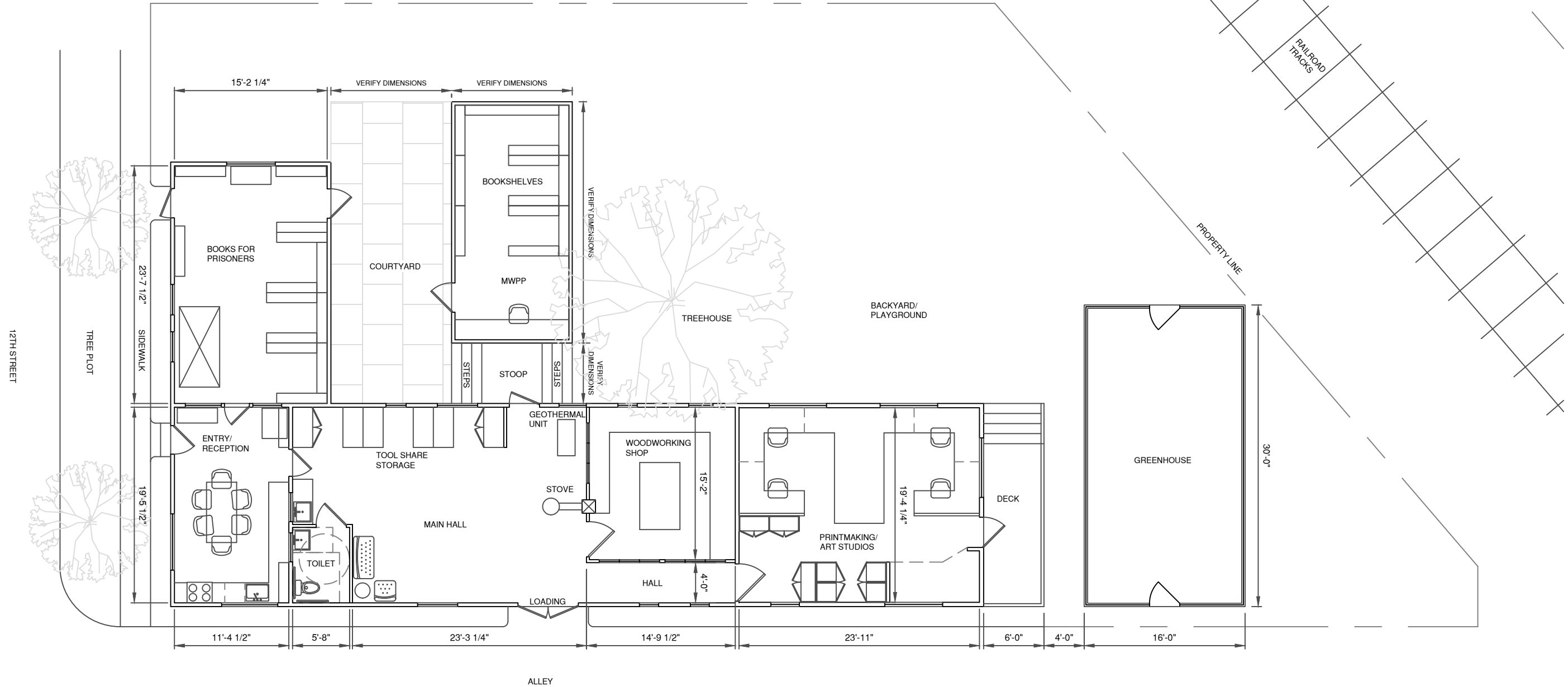
REVISIONS

FLOORPLAN AND FUNCTION LAYOUTS
THE OVERLOOK
613 W. 12TH STREET
BLOOMINGTON

INDIANA

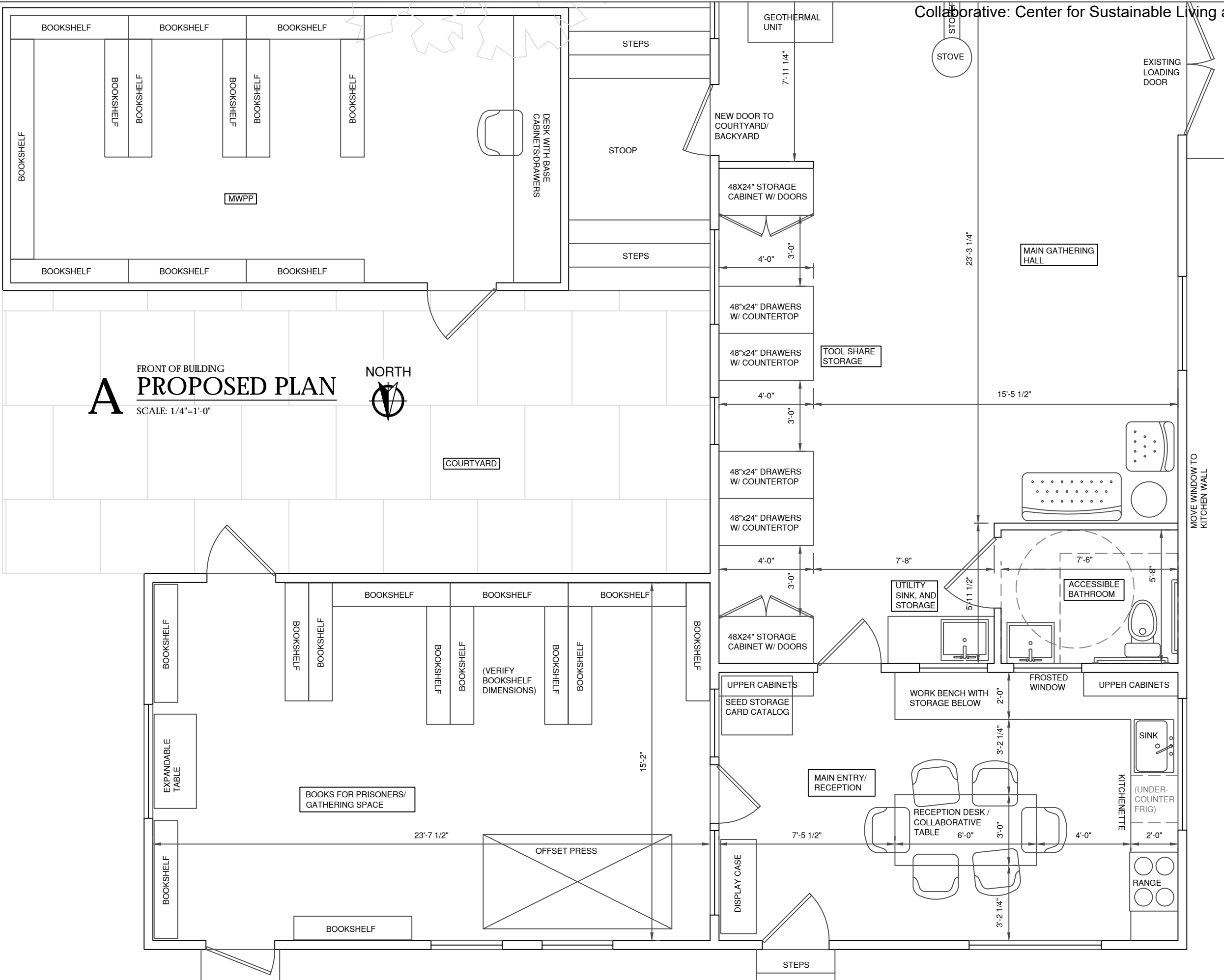
PROJECT NUMBER:
1902
DATE:
MARCH 5, 2019
DRAWN BY:
L NOGGLE

FULL PLAN



A SITE PLAN
SCALE: 3/32"=1'-0"





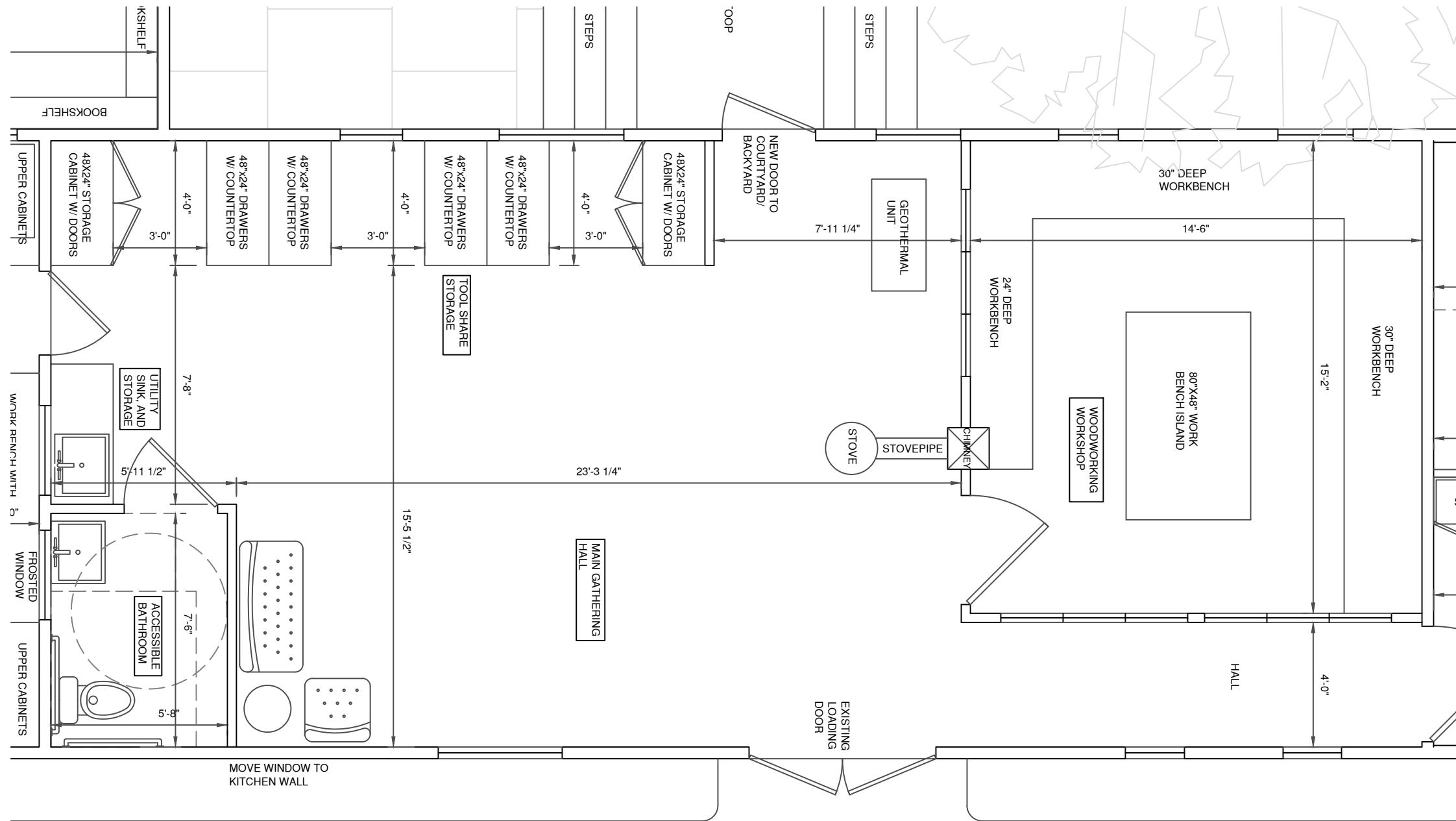
A FRONT OF BUILDING
PROPOSED PLAN
 SCALE: 1/4"=1'-0"
 NORTH

| REVISIONS |
|-----------|
| |

FLOORPLAN AND FUNCTION LAYOUTS
THE OVERLOOK
 613 W. 12TH STREET
 BLOOMINGTON
 INDIANA

PROJECT NUMBER:
 1902
 DATE:
 MARCH 5, 2019
 DRAWN BY:
 L NOGGLE

FRONT HALF OF
 BUILDING



MIDDLE OF BUILDING
A PROPOSED PLAN
 SCALE: 1/4"=1'-0" NORTH

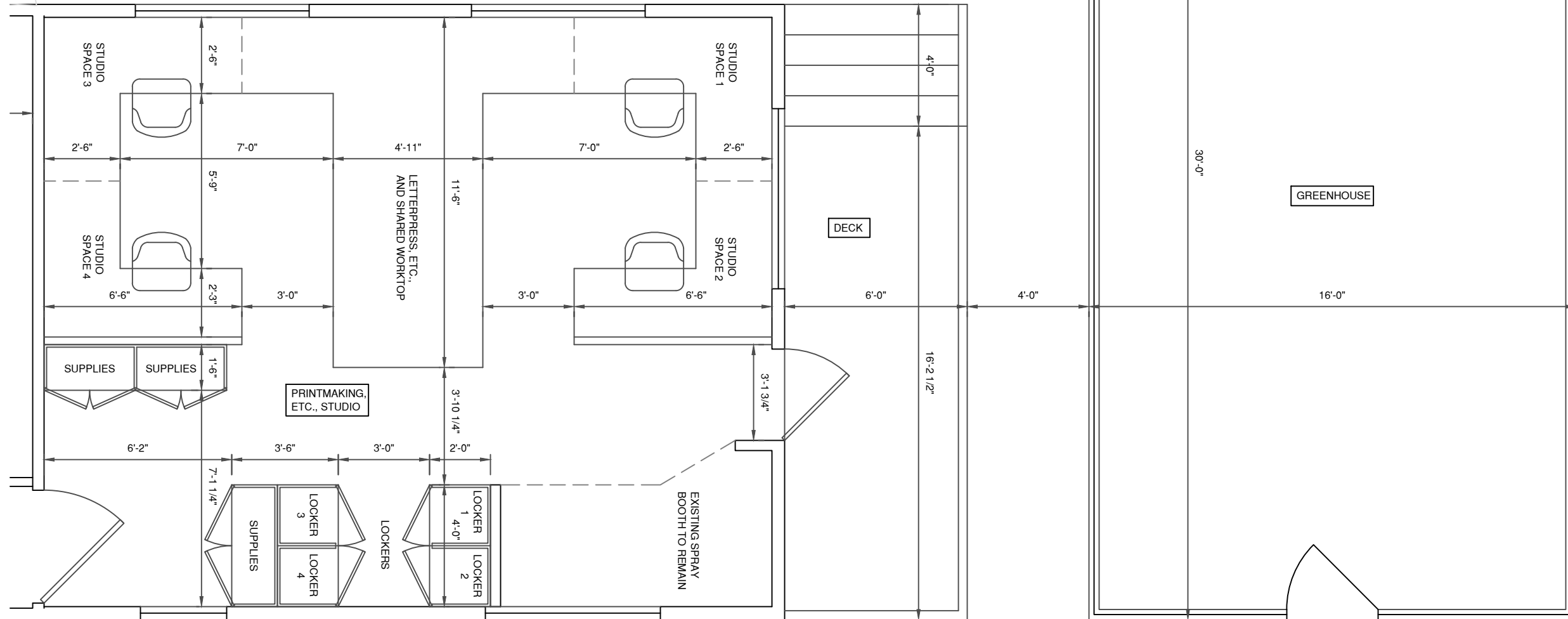
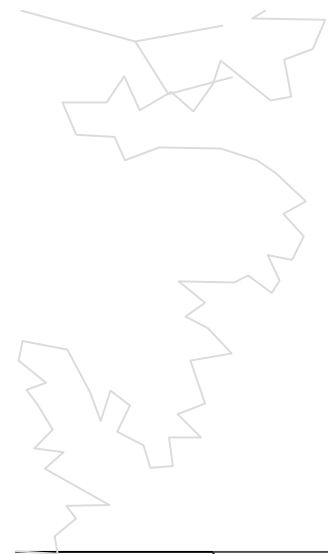
L NOGGLE
 Architectural Design

REVISIONS

INDIANA
 FLOORPLAN AND FUNCTION LAYOUTS
THE OVERLOOK
 613 W. 12TH STREET
 BLOOMINGTON

PROJECT NUMBER:
 1902
 DATE:
 MARCH 5, 2019
 DRAWN BY:
 L NOGGLE

MIDDLE OF BUILDING



REAR OF BUILDING
A PROPOSED PLAN
 SCALE: 1/4"=1'-0"



L NOGGLE
 Architectural Design
 PH 812 . 320 . 5865
 lnoggledesigns@gmail.com

REVISIONS

| | |
|--|--|
| | |
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FLOORPLAN AND FUNCTION LAYOUTS
THE OVERLOOK
 613 W. 12TH STREET
 BLOOMINGTON
 INDIANA

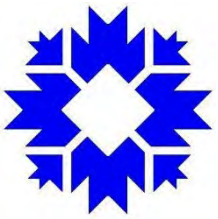
PROJECT NUMBER:
 1902
 DATE:
 MARCH 5, 2019
 DRAWN BY:
 L NOGGLE

REAR HALF OF
 BUILDING









**CITY OF BLOOMINGTON, COMMON COUNCIL
JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE
2019 GRANT APPLICATION**

AGENCY CONTACT INFORMATION

Lead Agency Name: Shalom Community Center, Inc.

Address: PO Box 451 / 620 S Walnut Street. Bloomington, IN 47402-0451

Phone: 812-334-5734

E-Mail: shalom@shalomcommunitycenter.org

Website: www.shalomcommunitycenter.org

President of Board of Directors: Jane Martin

Name of Executive Director: Forrest Gilmore

Phone: (812) 334-5734, ext. 122

E-Mail: forrest@shalomcommunitycenter.org

Name and Title of Person to Present Proposal to the Committee: As above

Phone:

E-Mail:

Name of Grant Writer: As above

Phone:

E-Mail:

AGENCY INFORMATION

Lead Agency: Shalom Community Center, Inc.

Is Lead Agency a 501(c)(3)? Yes No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees:

| Full-Time | Part-Time | Volunteers |
|-----------|-----------|----------------|
| 17 | 12 | 1494 (in 2018) |

AGENCY 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.

Shalom Community Center is dedicated to aiding and empowering people experiencing hunger, homelessness, and poverty. Founded in 2000 in response to a growing community concern about the needs of people without homes, Shalom has grown rapidly these past 18 years to become the most comprehensive response to extreme poverty, most notably homelessness, in Monroe County. Shalom provides daytime and overnight shelter, hunger relief, permanent supportive housing, rapid re-housing, social services and case management, employment support, street outreach, eviction prevention, prescription and health care assistance, 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

Project Name: A Secure Home

Total cost of project: \$10,997.50

Requested amount of JHSSF funding: \$8,497.50

Total number of City residents anticipated to be served by this project in 2019: 60

Total number of clients anticipated to be served by this project in 2019: 60

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

Shalom Community Center and LifeDesigns are requesting a collaborative grant in the amount of \$8,497.50 for fifty SCYAN D5 Deadbolt Locks to support the Crawford and Crawford II permanent supportive housing programs.

Housing stability is a key priority for the Crawfords. All of the residents have disabilities and have experienced long-term homelessness prior to moving in. While helping a person move into a new home can be challenging, helping them maintain their homes might be even more difficult.

One of our more significant challenges with helping residents maintain their homes is the behavior of visitors. Visitors can sometimes take advantage of the residents and behave poorly, given a lack of investment in what are other people's homes. Residents often struggle to say no to visitors and are at times threatened by visitors to get access to their homes. In addition, a significant number of keys are given away or stolen and late night and weekend lock-outs are a challenging problem for property management staff.

The fingerprint locks will be placed on the doors to the resident's apartments and the residents will be the only ones who can unlock their door. Our hope is this will reduce some of the challenges we've had with visitors who don't respect the buildings or its residents as well as off-hours lockouts.

Addresses where project will be housed: 2440 S. Henderson St. and 2446 S Henderson St.

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

Yes No N/A

LifeDesigns does.

If you are seeking funds to capital improvements to real estate and if you do not own the property at which the project 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

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s): LIFE Designs

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges.

LIFE Designs' mission is to partner with people of all ages and abilities to lead meaningful and active lives. The mission of the Shalom Community Center is to aid and empower people experiencing homelessness and poverty.

LIFE Designs and Shalom Community Center are partners in two programs providing permanent supportive housing to chronically homeless people with disabilities. LIFE Designs owns the buildings, provides property management through Valenti Real Estate Services, provides training to the staff, and participates in eviction prevention. Shalom pays the rents, provides case management, service coordination, and also participates in eviction prevention. Using Housing First and harm reduction principles, Shalom, Valenti, and LIFE Designs work very closely together to support the residents to maintain their housing and improve their health and income. Property management and case management communicate daily, making important decisions together.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General request for operational funds pursuant to 2019 funding guidelines.

Other Funds Expected for this Project (*Please indicate source, amount, and whether confirmed or pending*): At this time, we do not have other funding aligned for this project with the exception of the installation costs, which are already on hand.

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds: If awarded the funds we would immediately take steps to purchase and install the equipment. The project will likely be completed with all reimbursements submitted prior to December 1st.

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.

Both Shalom and LIFE Designs provide hundreds of thousands of dollars in funding each year to the Crawford programs, including rental and utility costs, case management, property management, maintenance and repair, security, etc. Life Designs will provide the costs of labor for the installation of the locks, valued at approximately \$2,500.

FUNDING PRIORITIES -- RANKED

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

Yes No

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

| | Item | Cost |
|------------------------|---|-------------------|
| Priority #1 | Fifty Fingerprint Deadbolt Locks (we can reduce the number of locks if we do not receive full funding) | \$8,497.50 |
| Priority #2 | | |
| Priority #3 | | |
| Priority #4 | | |
| Priority #5 | | |
| Priority #6 | | |
| Priority #7 | | |
| TOTAL REQUESTED | | \$8,497.50 |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2015-2019 Consolidated Plan listed five City of Bloomington priorities. The third priority reads, "Permanently Supportive Housing. Provide funding for future permanently supportive housing developments. In 2013, the City of Bloomington provided HOME Investment Partnership Funds to assist in the development of the 25 unit Crawford Apartments. Crawford Apartments is a "housing first" supportive housing development."

This City of Bloomington priority directly refers to support for Shalom and LIFE Designs' first permanent supportive housing program, Crawford Apartments, and calls for future support of similar programs. Crawford II was such a "future" program with City support already demonstrated through HOME Investment Partnership Funds to partially fund LIFE Designs' construction of the building.

In addition, the Consolidated Plan addresses the concerns of chronically homeless people at least ten times.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

As a capital expenditure, this will be a one-time expense.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Ultimately, the goal of all Housing First programs is to end chronic homelessness. Chronic homelessness is defined as long-term homelessness due to disabilities. The average age of death for a chronically homeless person is 47 years old. People experiencing chronic homelessness often have a significant impact on social services, health care, and criminal justice. In addition to the obvious benefit it provides to the residents, permanent supportive housing has been demonstrated to save the community money, approximately a net savings of \$20,000 per person per year. During the first year of Crawford Apartments, we ended more than 300 years of collective homelessness for more than 60 adults and children, saw a 92% housing stability rate, a 65% drop in emergency room use from the previous year, and an 88% drop in incarcerations. This is a solutions-based program for the challenge of chronically homelessness, which achieves exceptional impact.

The goal of the funding of the locks is to increase housing stability, improving the chances that people stay in their homes.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use 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 indicators used to measure the change your program has created during the period of your funding agreement. Where possible, this information should be expressed in quantitative terms.

Examples: an agency providing a service might cite to the number of persons with new or improved access to a service. If funds were used to meet a quality standard, the agency might report the number of people who no longer have access to a substandard service. An agency seeking to purchase equipment or to make a physical improvement might cite to the number of residents with new or improved access to a service or facility. If funds were used to meet a quality standard or to improve quality of a service or facility, an agency might report the number of people who have access to the improved service or facility.

We will measure housing stability over the course of the grant period (i.e. the percentage of residents who remain housed within the given time period). Over 80% would be considered exceptional by national standards. We'll also report general impressions of the residents of the new locks and make note of their durability and effectiveness.

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.

In 2010, Frank Crawford, a guest of Shalom Center, passed away next to a dumpster behind the old Ponderosa restaurant, what is now the Post Office on Kirkwood. Frank was chronically homeless, dealing with chronic illness, physical disabilities, clinical depression, and late stage alcohol addiction, what we call tri-morbidity. He had been in and out of nursing homes where he would obtain a level of health and recovery to then be released to homelessness again because he was “too healthy” to stay. He passed away just a few weeks after being released from a nursing home for the last time.

His death inspired a team of people working through the South Central Housing Network to bring a housing response to Bloomington to support people like Frank.

From this group, *Life Designs* was seen as the perfect partner to build and manage an apartment complex and Shalom was seen as the right organization to provide services for the complex’s future residents. From that, Crawford Homes was born, opening in the Fall of 2013.

After several years of a successful collaboration between *Life Designs* and Shalom Community Center, Crawford II was opened this December of 2017. Providing 83 apartments (61 at the *LIFE Designs* complex and another 22 with additional landlords in the community), Crawford I & II are now providing permanent housing and supportive services to more than 100 formerly homeless adults and children with disabilities.

Crawford I & II uses a housing first, harm reduction model to help chronically homeless individuals and families maintain their housing and improve their life circumstances. A unique component of the program, Crawford I & II provide housing not based on a first-come, first-served model, but based on vulnerability, or more specifically, the likelihood of death within the next year. In that way, housing always goes to the people who need it the most. This is a nationally proven model shown to be highly effective at securing stable housing for people who have experienced long-term homelessness.

Program Budget 2019

\$8,497.50 Purchase and delivery of fifty SCYAN D5 Deadbolt Locks at \$169.95 per lock

\$2,500 Approximate installation costs for locks

\$10,997.50 TOTAL COST

\$8,497.50 JACK HOPKINS GRANT REQUEST

Further details are in attached order form.

Memorandum of Understanding
LIFE Designs and Shalom Community Center
7/1/2019 – 6/30/2020

Purpose

The purpose of the memorandum is to develop a framework of cooperation between LIFE Designs and Shalom Community Center in order to manage a grant from the Jack Hopkins Social Service Funding Committee, which shall provide financial support for purchase and installation of fingerprint deadbolt locks at Crawford and Crawford II Apartments.

Statement of mutual benefit:

The residents, staff, and agencies of the Crawford II Program will benefit from more secure doors to resident's apartments, preserving housing stability and reducing issues with trespassing and negative behavior from unwanted visitors.

LIFE Designs Shall:

Provide 61 apartments for the Crawford and Crawford II program, operating from a housing first and eviction prevention approach.

Provide property management to inspect units for lease compliance and coordinating with Shalom to provide supports to improve housing stability and remediate concerns.

Install the locks on the residents' doors.

Shalom Shall:

Act as fiscal agent for any monies acquired from the Jack Hopkins Social Services grant.

Purchase and deliver the locks to the apartment complexes.

Track and record the outcomes required for any grants received.

Commencement, Termination & Expiration

This instrument is executed on July 1st, 2019 through June 30th, 2020 and may be canceled at any time by any party with written 30 day notification.

Principal Contacts

The principal contacts for this instrument are:

| | |
|---|--|
| Russell Bonanno, Chief Executive Officer LIFE Designs 200 E. Winslow Rd. Bloomington, IN 47401 812-332-9615 | Forrest Gilmore, Executive Director Shalom Community Center PO Box 451/620 S. Walnut St. Bloomington, IN 47402-0451 812-334-5734 |
|---|--|

Indemnification

LIFE Designs and Shalom 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.

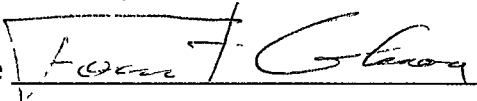
Governing Law

This Agreement shall be governed by and construed under the laws of the State of Indiana.

LIFE Designs

Signature _____ Date _____

Shalom Community Center

Signature  Date 4/1/19



MY CART (0)



Search

Categories

- FINGERPRINT LOCKS
- FINGERPRINT DEADBOLT
- KEYLESS KEYPAD LOCKS
- ACCESSORIES
- CLEARANCE SALE
- ACCESS CONTRAL

Home > Fingerprint deadbolt

Fingerprint deadbolt

Products (Total Items: 1)

Sort by: Or



SCYAN D5 Fingerprint Deadbolt Lock



\$169.95

IN STOCK. FREE SHIPPING

ADD TO CART

Top Sellers



Adel Fingerprint Password door Lock Spring



\$15.00

LEARN MORE



The D5 deadbolt offers a convenient and secure lock system solution that adopts the latest and most advanced fingerprint lock technologies. The fingerprint sensor in the lock is combined with the touch active sensor. This feature allows an easy and fast fingerprint entry--one touch on the fingerprint sensor unlocks. The lock is also equipped with a standard 12-key touchscreen. The touchscreen allows a user to unlock using a user code.

Description:

Three ways to unlock: fingerprint, user code, or key.

Up to 100 fingerprint users could be enrolled in the system.

Up to 100 user codes could be programmed into the system.

Support code partial match, you may input any prefixes and suffixes number.

Individual fingerprint user and user code deletion.

Build-in touch active sensor, one touch to unlock.

Self-learning ability: fingerprint template is updated after every fingerprint entry.

Two ways to login the system: programming code or administrator fingerprint.

Memory function: "power run-out" or "system reset" will not cause the loss of registered fingerprint(s) and user code(s).

"Schlage C key" as an override key.

9V battery may be attached as an additional power source.

Low battery alert.

Specifications:

Optical sensor.

Standard 12-key touchscreen.

Adjustable backset 2 3/8" or 2 3/4".

Fit door thickness between 1 3/8" and 1 7/8".

Operation temperature from -4°F to 151°F (-20°C to 66°C).

Powered by 4 AA Alkaline batteries (NOT included).

One year limited manufacturer's warranty.

Balance Sheet
As of December 31, 2018
Dec 31, 18

Collaborative: Shalom & LIFE Designs

ASSETS

Current Assets

Checking/Savings

| | |
|-------------------------------------|------------|
| B1000 · B1000 Old National Checking | 352,805 25 |
| B1002 · B1002 Capital Reserve | 31,980 73 |
| B1003 · B1003 Friends Place Account | 611 80 |
| B1005 · B1005 Cash Reserves Account | -15 16 |

Total Checking/Savings 385,382 62

Accounts Receivable

| | |
|---|---------|
| B1010 · B1010 A/R Grants | -271 00 |
| B1012 · B1012 A/R Unrestricted Donation | -221 65 |

Total Accounts Receivable -492 65

Other Current Assets

| | |
|---------------------------|------------|
| 12000 · Undeposited Funds | 371 00 |
| B1210 · Friend's Place CD | 197,048 69 |

Total Other Current Assets 197,419 69

Total Current Assets 582,309 66

Fixed Assets

| | |
|---|-------------|
| B1018 · B1018 Land | 140,980 88 |
| B1020 · B1020 Buildings | 177,879 12 |
| B1022 · B1022 Furniture and Fixtures | 27,447 11 |
| B1024 · B1024 Furniture and Fixtures FP | 19,590 34 |
| B1026 · B1026 Equipment FP | 1,199 00 |
| B1028 · B1028 Equipment | 66,666 97 |
| B1040 · B1040 Accumulated Depreciation | -190,729 99 |
| B1044 · B1044 Building Improvements | 290,473 16 |
| B1046 · B1046 Land Improvements | 6,899 00 |

Total Fixed Assets 540,405 59

TOTAL ASSETS 1,122,715.25

LIABILITIES & EQUITY

Liabilities

Current Liabilities

Accounts Payable

| | |
|------------------------|-----------|
| B2042 · B2042 Payables | -1,639 07 |
|------------------------|-----------|

Total Accounts Payable -1,639 07

Other Current Liabilities

| | |
|---------------------------------------|----------|
| B2030 · B2030 Deductions Payable | 346 22 |
| B2036 · B2036 Flex Med Spending Ded | 1,603 65 |
| B2038 · B2038 Empl United Way Payable | 555 01 |
| B2044 · B2044 Garnishment | -86 22 |

Total Other Current Liabilities 2,418 66

Total Current Liabilities 779 59

Long Term Liabilities

| | |
|---------------------------------------|----------|
| B2040 · B2040 Note Payable - Building | 1,009 32 |
|---------------------------------------|----------|

Total Long Term Liabilities 1,009 32

Total Liabilities 1,788 91

Equity

| | |
|--------------------------------|------------|
| 30000 · Opening Balance Equity | 657,395 44 |
| 32000 · Retained Earnings | 413,616 67 |
| Net Income | 49,914 23 |

Total Equity 1,120,926 34

TOTAL LIABILITIES & EQUITY 1,122,715.25

Shalom Community Center
Statement of Financial Income and Expense

Collaborative: Shalom & LIFE Designs

| | <u>Jan - Dec 18</u> |
|--|---------------------|
| Income | |
| C4000 C4000 - Income Used for Capital | 51,840 33 |
| D0000 · D0000 Designated Income | |
| D4020 · D4020 Indiv Designated Gif | 2,700 00 |
| D4030 · D4030 Designated Fund Grants | 16,189 22 |
| Total D0000 · D0000 Designated Income | <u>18,889 22</u> |
| F0000 · F0000 Friends Place Income | |
| F1000 · F1000 Friend's Place Income | 66,915 50 |
| F1100 Friend's Place Interest Income | 53 97 |
| Total F0000 · F0000 Friends Place Income | <u>66,969 47</u> |
| G0000 · Grant Income | |
| G0001 · 14.267 HUD Supportive Housing | |
| G1025 · Crawford 18 IN0147L5H021602 | |
| G1030 · Crawford Occupancy Fees 2018 | 10,545 00 |
| G1035 · Crawford Non-HUD 2018 | |
| G1038 · Small & Simple Grant | 500 00 |
| G1035 Crawford Non-HUD 2018 - Other | 2 941 51 |
| Total G1035 Crawford Non-HUD 2018 | <u>3 441 51</u> |
| G1025 Crawford 18 IN0147L5H021602 - Other | 216,283 36 |
| Total G1025 · Crawford 18 IN0147L5H021602 | <u>230,269 87</u> |
| G1026 · Crawford 19 IN0147L5H021703 | |
| G1031 · Crawford Occupancy Fees 2019 | 12,528 50 |
| G1032 · Crawford Non-HUD 2019 | 6,501 95 |
| G1026 Crawford 19 IN0147L5H021703 - Other | 182,871 53 |
| Total G1026 · Crawford 19 IN0147L5H021703 | <u>201 901 98</u> |
| G2026 · Johnson 18 IN0181L5H021500 | |
| G2027 · Johnson Occupancy Fees 2018 | 8,861 00 |
| G2028 · Johnson Non-HUD Grants 2018 | |
| G2029 · Jack Hopkins - for Johnson 2018 | 8,915 00 |
| Total G2028 · Johnson Non-HUD Grants 2018 | <u>8,915 00</u> |
| G2026 · Johnson 18 IN0181L5H021500 - Other | 283,172 83 |
| Total G2026 · Johnson 18 IN0181L5H021500 | <u>300 948 83</u> |
| G2126 Johnson 19 IN0181L5H021701 | |
| G2127 · Johnson Occupancy Fees 2019 | 2,507 00 |
| G2128 Johnson Non-HUD Grants 2019 | 100 00 |
| G2126 · Johnson 19 IN0181L5H021701 - Other | 102,133 25 |
| Total G2126 · Johnson 19 IN0181L5H021701 | <u>104,740 25</u> |
| G2300 · Coord Entry IN0194L5H021600 | 2,789 25 |
| Total G0001 14.267 HUD Supportive Housing | <u>840,650 18</u> |
| G0002 · 14.231 IHEDA Grants | |
| G1010 · IHEDA ESG-Shelter | 62,237 34 |
| G1015 · Rapid Rehousing | |
| G1018 · Rapid Rehousing - Foundation | 50,000 00 |
| G1015 · Rapid Rehousing - Other | 248,827 16 |
| Total G1015 · Rapid Rehousing | <u>298,827 16</u> |
| G1020 · IHEDA ESG - Outreach | |
| G1021 · COB Outreach | 40,479 87 |
| G1020 · IHEDA ESG - Outreach - Other | 27,678 50 |
| Total G1020 · IHEDA ESG - Outreach | <u>68,158 37</u> |
| Total G0002 · 14.231 IHEDA Grants | <u>429,222 87</u> |
| G0005 · 93.558 TANF | |
| G1017 · TANF Income | 39,686 48 |
| Total G0005 · 93.558 TANF | <u>39,686 48</u> |
| G1050 · Various Small Grants | 15,777 40 |
| G1060 · LocalMotion Grant | 1,500 00 |
| Total G0000 Grant Income | <u>1,326,836 93</u> |
| K4000 · In-kind Income | 30,344 21 |

Statement of Financial Income and Expense

Collaborative: Shalom & LIFE Designs

| | <u>Jan - Dec 18</u> |
|--|---------------------|
| O0000 · Operating Income | |
| O4000 · Individual - for Operations | 235,187 37 |
| O4005 · Faith Comm for Operations | 19 923 40 |
| O4010 · Businesses for Operations | 37 785 81 |
| O4035 · Organizations for Opns | 55 780 38 |
| O4055 · NAP Contributions | 20,275 00 |
| O4065 · Other Operating Income | 15 17 |
| O4070 Weekend Program Fee | 5,706 46 |
| O4080 · Hunger Relief | <u>23,274 15</u> |
| Total O0000 Operating Income | 397,947 74 |
| S0000 · Weekend Operations Income | <u>89,000 00</u> |
| Total Income | <u>1,981,827 90</u> |
| Gross Profit | 1,981 827 90 |
| Expense | |
| 66900 · Reconciliation Discrepancies | -0 01 |
| D6400 · Guest Needs Designated | |
| D6410 · D6410 Guest Needs Other Desig | 149 30 |
| D6420 · D6420 Guest BMV/B C. Fees | 3,790 10 |
| D6430 · D6430 Guest Needs - HIP Payment | 1,629 08 |
| D6450 · D6450 Out of Town Bus Tickets | 6,876 00 |
| D6460 · D6460 Guest Needs -Pharmacy | 1,347 71 |
| D6470 D6470 Client Utilities and Rent | 11,152 41 |
| D6480 · Local Bus Tickets | <u>600 00</u> |
| Total D6400 · Guest Needs Designated | 25 544 60 |
| F6000 · F6000 Friends Place Expenses | |
| F6100 · Salaries/Wages Friend | 129,205 38 |
| F6105 · Payroll Taxes Friend | 10,611 81 |
| F6106 · WC & HC Friend | 9,572 93 |
| F6210 · Office Supplies | 222 69 |
| F6220 · Fundraising Expense | 5,268 48 |
| F6235 · Computer Equipment | 87 00 |
| F6245 · Telephone | 1 283 35 |
| F6250 Internet Service | 555 47 |
| F6260 Miscellaneous Expense | 204 52 |
| F6305 · Custodial Supplies | 1 343 13 |
| F6310 · Waste Removal | 418 08 |
| F6319 · Fire Suppression | 1,030 05 |
| F6320 Maintenance and Repair | 914 16 |
| F6321 · Pest Control | 3,624 00 |
| F6325 · Kitchen Supplies | 14 98 |
| F6335 · Electricity | 5,870 44 |
| F6340 · Natural Gas | 2,832 00 |
| F6345 · Water Expense | 1,555 03 |
| F6450 · Guest Needs | <u>213 00</u> |
| Total F6000 · F6000 Friends Place Expenses | 174,826 50 |
| G6000 · Grant Expenditures | |
| G6001 14.267 HUD Supportive Housing | |
| G6025 · Crawford 2017 IN0147L5H021501 | |
| G6043 · Crawford 17 Non-Salary Expenses | 37 35 |
| G6051 · Crawford 17 Occupancy Fees Exp | |
| G6390 · Crawford 2017 OF Staff Reimb | 311 94 |
| G6391 · Crawford 2017 OF Welcome Kits | 664 19 |
| G6395 · Crawford 2017 OF Other Exp | 46 38 |
| G6051 · Crawford 17 Occupancy Fees Exp - Other | <u>346 89</u> |
| Total G6051 Crawford 17 Occupancy Fees Exp | 1,369 40 |

Shalom Community Center
Statement of Financial Income and Expense

Collaborative: Shalom & LIFEDesigns

| | <u>Jan - Dec 18</u> |
|---|---------------------|
| G6292 · Crawford Non-HUD 2017 | |
| G6298 · Boston Scientific Expenses | 3,512 09 |
| G6292 · Crawford Non-HUD 2017 - Other | 150 00 |
| Total G6292 · Crawford Non-HUD 2017 | 3,662 09 |
| Total G6025 · Crawford 2017 IN0147L5H021501 | 5,068 84 |
| G6225 · Crawford 2018 IN0147L5H021601 | |
| G6250 · Salary/Wage Crawford 2018 | 32 584 78 |
| G6255 · Payroll Tax Crawford 2018 | 2,848 38 |
| G6260 · Other Admin Exp Crawford 2018 | 951 40 |
| G6288 · Non-Salary Crawford 2018 | 117 683 43 |
| G6301 · Crawford 18 Occupancy Fees Exp | |
| G6302 · Crawford 2018 OF Staff Reimb | 99 94 |
| G6304 · Crawford 2018 OF Cleaning | 160 00 |
| G6305 · Crawford 18 OF Other Exp | 5,011 17 |
| G6301 · Crawford 18 Occupancy Fees Exp - Other | 4,824 10 |
| Total G6301 · Crawford 18 Occupancy Fees Exp | 10 095 21 |
| G6225 · Crawford 2018 IN0147L5H021601 - Other | 82 91 |
| Total G6225 · Crawford 2018 IN0147L5H021601 | 164,246 11 |
| G6271 · Crawford Non-HUD 2018 | |
| G6297 · Small & Simple Grant Exp 2018 | 500 00 |
| G6271 · Crawford Non-HUD 2018 - Other | 150 00 |
| Total G6271 · Crawford Non-HUD 2018 | 650 00 |
| G6275 · Johnson 2018 IN0181L5H021500 | |
| G6170 · Salary/Wage Johnson 2018 | 53,376 79 |
| G6175 · Payroll Tax Johnson 2018 | 4 470 94 |
| G6180 · Johnson 2018 Non-Salary | 255,046 37 |
| G6185 · Johnson 18 Occupancy Fees Exp | 5 691 19 |
| G6190 · Johnson Non-HUD 2017-2018 | |
| G6192 · Jack Hopkins for Johnson 2018 | 8 915 65 |
| G6190 · Johnson Non-HUD 2017-2018 - Other | 2,190 32 |
| Total G6190 · Johnson Non-HUD 2017-2018 | 11,105 97 |
| Total G6275 · Johnson 2018 IN0181L5H021500 | 329,691 26 |
| G6276 · Johnson 2019 IN0181L5H021701 | |
| G6171 · Salary Wage Johnson 2019 | 19,453 93 |
| G6176 · Payroll Tax Johnson 2019 | 1 519 33 |
| G6181 · Johnson 2019 Non Salary | 79,158 17 |
| G6186 · Johnson 19 Occupancy Fees Exp | |
| G6187 · Johnson 19 OF Staff Reimburse | 75 00 |
| G6189 · Johnson 2019 OF Other Expenses | 2,133 51 |
| Total G6186 · Johnson 19 Occupancy Fees Exp | 2,208 51 |
| G6191 · Johnson Non-HUD 2018-2019 | 600 00 |
| Total G6276 · Johnson 2019 IN0181L5H021701 | 102,939 94 |
| G6401 · Coordinated Entry | |
| G6402 · Coordinated Entry Payroll | 5,910 23 |
| G6403 · Coordinated Entry Payroll Tax | 462 47 |
| Total G6401 · Coordinated Entry | 6,372 70 |
| G6826 · Crawford 2019 IN0147L5H020703 | |
| G6810 · Salaries & Wages Crawford 2019 | 45,729 53 |
| G6811 · Payroll Taxes Crawford 19 | 3,585 29 |
| G6812 · Crawford Non-HUD 2019 Exp | 375 00 |
| G6827 · Non-Salary Expenses Crawford 19 | 163,545 59 |
| G6828 · Crawford 19 Occupancy Fees Exp | |
| G6829 · Crawford 2019 OF Staff Reimb | 93 51 |
| G6830 · Crawford 2019 OF Cleaning | 4,600 00 |
| G6831 · Crawford 2019 OF Other Exp | 3,398 74 |
| G6826 · Crawford 19 Occupancy Fees Exp - Other | 3,214 33 |
| Total G6826 · Crawford 19 Occupancy Fees Exp | 11,306 65 |
| Total G6826 · Crawford 2019 IN0147L5H020703 | 224,542 04 |
| Total G6001 · 14 267 HUD Supportive Housing | 833,510 89 |

Shalom Community Center
Statement of Financial Income and Expense

Collaborative: Shalom & LIFE Designs

| | <u>Jan - Dec 18</u> |
|--|---------------------|
| G6002 · 14.231 IHCD Grants | |
| G6100 · G6100 ESG Shelter | |
| G6110 · G6110 Salary/Wage ESG Shelter | 50,420 50 |
| G6115 · G6115 Payroll Tax ESG Shelter | 4 377 56 |
| G6280 · G6280 Non-Salary ESG Shelter | 17 469 23 |
| Total G6100 · G6100 ESG Shelter | <u>72,267 29</u> |
| G6200 · G6200 - ESG Outreach | |
| G6120 · G6120 Salary/Wage ESG Outreach | 36,607 60 |
| G6125 · G6125 Payroll Tax ESG Outreach | 2 987 27 |
| G6282 · G6282 Non-Salary ESG Outreach | 9,386 35 |
| Total G6200 · G6200 - ESG Outreach | <u>48,981 22</u> |
| G6300 · G6300 ESG Rapid Rehousing | |
| G6130 · G6130 Wages Rapid Rehousing | 56 660 51 |
| G6135 · G6135 Payroll Tax Rapid Re | 5,097 52 |
| G6283 · G6284 Non-Salary Rapid Rehous | |
| G6380 G6380 RR Rental Assistance | 116,958 92 |
| G6381 · G6381 RR Financial Assistance | 45 140 55 |
| G6283 · G6284 Non-Salary Rapid Rehous - Other | 1 101 63 |
| Total G6283 · G6284 Non-Salary Rapid Rehous | <u>163 201 10</u> |
| G6351 · Rapid Rehousing Foundation Gr | |
| G6352 · Salaries Wages RR Foundation | 8 540 24 |
| G6353 · Payroll Taxes RR Foundation | 667 49 |
| G6354 · Non-Salary Expense RR Foundatio | 4,974 93 |
| Total G6351 · Rapid Rehousing Foundation Gr | <u>14,182 66</u> |
| G6361 · Rapid Rehousing Facebook Donati | |
| G6362 Non-Salary Exp Facebook | 384 49 |
| Total G6361 · Rapid Rehousing Facebook Donati | <u>384 49</u> |
| Total G6300 · G6300 ESG Rapid Rehousing | <u>239,526 28</u> |
| Total G6002 14.231 IHCD Grants | <u>360 774 79</u> |
| G6003 · 14.267 Point-in-Time Count | 1 215 00 |
| G6005 · 93.558 TANF | |
| G6400 · G6400 TANF Expenditures | |
| G6140 · Salaries/Wages TANF-ADMIN | 232 32 |
| G6145 · G6145 Payroll Tax TANF-ADMIN | 19 37 |
| G6286 · G6286 Non-Salary TANF | |
| G6382 G6382 Non Salary TANF-Rental | 18,953 94 |
| G6383 · G6383 Non Salary TANF Fin. Asst | 16,703 21 |
| Total G6286 · G6286 Non-Salary TANF | <u>35,657 15</u> |
| Total G6400 · G6400 TANF Expenditures | <u>35,908 84</u> |
| Total G6005 · 93.558 TANF | <u>35,908 84</u> |
| G6006 · Bike Rack Enclosure | 750 00 |
| G6199 · Healthcare & WC-Grants | 22,541 26 |
| G6600 · G6600 Various Small Grant | |
| G6160 · G6160 Salary/Wage Var Small Gr | 632 19 |
| G6165 · G6165 Payroll Tax Var Small Gr | 50 76 |
| G6294 · G6294 Non-Salary Var Small Gr | 5,652 22 |
| Total G6600 · G6600 Various Small Grant | <u>6,335 17</u> |
| Total G6000 · Grant Expenditures | <u>1,261,035 95</u> |

Shalom Community Center
Statement of Financial Income and Expense

Collaborative: Shalom & LIFE Designs

Jan - Dec 18

| | |
|--|--------------------------------|
| O6000 · Operating Expenses | |
| O6110 · Salary/Wage SCC | 182,636 75 |
| O6115 Payroll Tax - SCC | 14,386 61 |
| O6120 Workers Comp Ins | 1,985 51 |
| O6130 · Employee Health Benefits | 11 511 19 |
| O6140 · Subcont Work Study | 1,379 40 |
| O6200 · Office Supplies | 2,204 39 |
| O6201 · Internet Service | 2,050 88 |
| O6202 · Telephone | 1,862 21 |
| O6203 · Postage | 3,447 75 |
| O6204 · Insurance | 10,456 00 |
| O6205 · Computer Equipment | 125 00 |
| O6208 · Communications Expense | 516 95 |
| O6210 · Background Checks | 190 30 |
| O6212 · Employee Expense | 586 45 |
| O6220 · Equipment Lease | 5,303 93 |
| O6224 Payroll Accounting Fees | 2 683 53 |
| O6226 · Professional Fees | 8 422 22 |
| O6228 · Dues & Subscriptions | 286 26 |
| O6230 · Education/Seminars | 4 812 34 |
| O6232 · Bank/Credit Card Fees | 2,114 18 |
| O6234 · Fundraising Expense | 17,146 64 |
| O6236 Subcontractor - General | 101 12 |
| O6298 Miscellaneous Expense | 41,522 91 |
| O6299 · Interest Expense | 311 95 |
| O6310 · Custodial Supplies | 8,336 50 |
| O6315 · Kitchen Supplies | 5,368 53 |
| O6320 · Maintenance and Repair | 10,975 30 |
| O6340 Waste Removal | 2 734 91 |
| O6345 · Snow Removal | 110 00 |
| O6350 · Electricity | 4,941 94 |
| O6355 · Natural Gas | 1,261 16 |
| O6360 Water Expense | 6 201 98 |
| O6410 Food Expense | 43,212 14 |
| O6415 · Guest Needs - Operating | 309 58 |
| O6425 · Client Bus Tickets | 3,000 00 |
| O6000 · Operating Expenses - Other | 5,239 00 |
| Total O6000 · Operating Expenses | <u>407,735 51</u> |
| S6000 · Weekend Operations Expenses | |
| S6110 · Salary/Wage -Sat & Sun | 40,232 27 |
| S6115 · Payroll Tax Sat & Sun | 2,742 60 |
| S6125 · Workers Comp | 437 38 |
| S6220 · Supplies Sat & Sun | 208 04 |
| S6410 · Food and Kitchen Supplies - Sat | 13,342 37 |
| S6490 · Miscellaneous Sat & Sun | 5,808 46 |
| Total S6000 · Weekend Operations Expenses | <u>62,771 12</u> |
| Total Expense | <u>1,931,913 67</u> |
| Net Income | <u><u>49,914.23</u></u> |

AGENCY CONTACT INFORMATION

Lead Agency Name: South Central Indiana Housing Opportunities (SCIHO)

Address: 1007 N. Summit St., Bloomington, IN 47404

Phone: 812-335-2200

E-Mail: dmyerson@sciho.org

Website: www.sciho.org

President of Board of Directors: John Vargo

Name of Executive Director: Deborah Myerson

Phone: 812-993-0898

E-Mail: dmyerson@sciho.org

Name and Title of Person to Present Proposal to the Committee: Deborah Myerson, Executive Director

Phone: 812-993-0898

E-Mail: dmyerson@sciho.org

Name of Grant Writer: Deborah Myerson

Phone: 812-993-0898

E-Mail: dmyerson@sciho.org

AGENCY INFORMATION

Lead Agency:

Is Lead Agency a 501(c)(3)? [X] Yes [] No

Note: If your agency is a first-time applicant for Jack Hopkins funding, you must provide 501(c)(3) documentation with your application.

Number of Employees: 1

Full time: 1

Part Time: 1

Volunteers: 12

AGENCY 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.

South Central Indiana Housing Opportunities is dedicated to expanding housing options for low- and moderate-income households in Bloomington, Monroe County, and Brown, Greene, Lawrence, Owen, and Morgan Counties in South Central Indiana. Our vision is to build sustainable and inclusive communities that offer diverse housing options for people of all income levels, ages, and abilities.

PROJECT INFORMATION

Project Name: Tenant Assistance Table to Reduce Evictions

Total cost of project: \$32,944

Requested amount of JHSSF funding: \$15,352

Total number of City residents anticipated to be served by this project in 2019: Approximately 80% of clients will be Bloomington residents, about 288 city residents, between July – Dec. 2019.

Total number of clients anticipated to be served by this project in 2019: Approximately 360 clients. This figure for 6 months is estimated based on the last two years of Small Claims Court case filings for eviction and/or damages hearings in Monroe County.

PROJECT SYNOPSIS (250 words or less)

Please provide a brief overview of your project. This synopsis will be used in a summary of your proposal. Please begin your synopsis with the amount you are requesting and a concrete description of your proposed project. E.g., "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."

We are requesting \$15,352 to pilot a Tenant Assistance Table at the Monroe County Justice Center. This is a collaborative project that will be staffed by participating social services, mediation, and legal agencies to provide guidance to tenants during time scheduled for Small Claims Court eviction and damages hearings, approximately five hours weekly. The Tenant Assistance Table will provide support to tenants facing eviction proceedings and other housing issues. The goal is to reduce evictions and improve overall housing stability for renters in the City of Bloomington and Monroe County, particularly low-income households.

Address where project will be housed:

Charlotte T. Zietlow Justice Center, 301 N College 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 to capital improvements to real estate and if you do not own the property at which the project 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.

Not applicable

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.

Not applicable.

Is this a collaborative project? Yes No. If yes: List name(s) of agency partner(s):

Agency Partners:

All are 501 (c) 3 nonprofits, with the exception of the Tenant Assistance Project, an experiential learning clinic that is part of Indiana University, Maurer School of Law.

- Community Justice and Mediation Center - *promotes a civil and just community through mediation, education, and restorative justice.*
- Justice Unlocked – *a nonprofit sliding-scale legal clinic*
- South Central Indiana Housing Opportunities – *dedicated to expanding housing options for low- and moderate-income households*
- Tenant Assistance Project – *Indiana University, Maurer School of Law - provides legal help to tenants who face an immediate threat of eviction. Staffed by law students under the supervision of an attorney.*

If this is a collaborative project, please indicate: how your missions, operations and services do or will complement each other; the existing relationship between your agencies and how the level of communication and coordination will change as a result of the project; any challenges and steps you plan to take to address those challenges

Complementary Mission:

The breadth of collaboration on this project will ensure that every tenant who is facing the loss of their housing in Monroe County will have easily available and comprehensive access to social services, free legal aid, and free mediation between landlord and tenant. The hope is that joint delivery of all these services at one place and time will greatly reduce evictions. However, even if housing cannot be retained, the tenant will have an easier time getting new housing by presenting legal defenses, having their security deposits returned, learn of social services available with funds, counseling, and referral to other agencies; and mediation on payment plans so that past due rent can be paid more easily. The comprehensive approach piloted by the Tenant Assistance Table is poised to reduce evictions and improve housing stability in the community.

Existing Relationship:

The participating agencies have been collaborating together as part of a larger Monroe County Eviction Assistance Working Group, convened monthly by Judge Catherine Stafford and Judge Judith Benckart since January 2019 to examine:

- the need for early intervention;
- ways to clarify the eviction process for both landlords and tenants, and
- what resources could help reduce evictions.

Other participating agencies have included Perry Township, Shalom Community Center, District 10 Pro Bono Project, Indiana Legal Services, Indiana University Maurer School of Law, and IU Student Legal Services.

Changes in communication and coordination as a result of the project:

Currently, the Tenant Assistance Project (TAP) provides limited legal assistance for about 15% of the days set aside for eviction hearings. TAP is not able to provide assistance with any damages hearings at its current capacity. The Tenant Assistance Table will ensure legal aid to tenants is available at 100% of eviction hearings. The Tenant Assistance Table will raise the bar on these current services substantially, with twice-weekly coordination among the four participating agencies to train, schedule, and staff the table as well as provide applicable publications and resource materials.

SCIHO will hire a Program Coordinator that will be integral to administer and oversee this project. In addition to recruiting and training SCIHO's social services volunteers to staff at the table, the Program Coordinator will be the lead contact to communicate with participating

agencies, schedule table staffing, logistics, data entry, and compile the demographics and other information collected from each tenant.

Any challenges and steps you plan to take to address those challenges:

Communication can sometimes be a challenge in a joint project with mutual parties. However, as current partners in the Eviction Assistance Working Group, the agencies involved have had the opportunity to establish good channels of communication. We will seek to maintain this for the planning, implementation, and evaluation of the Tenant Assistance Table.

PROJECT COSTS

Is this request for operational funds? Yes No

If "yes," indicate the nature of the operational request:

Pilot Bridge Collaborative None of the Preceding – General
*request for operational funds pursuant to
2019 funding guidelines.*

Other Funds Expected for this Project (Please indicate source, amount, and whether confirmed or pending):

| Source | Amount | Status |
|---------------------------------------|---------------|---------------|
| Enterprise Community Partners (SCIHO) | \$2,592 | confirmed |

Please describe when you plan to submit your claims for reimbursement and what steps precede a complete drawdown of funds:

Since the Tenant Assistance Table will be meeting twice weekly, claims for reimbursement will be submitted on a monthly basis with applicable expenses for participating agencies. Project activity using Jack Hopkins funds for this pilot project will be completed by Dec 31.

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

Not applicable.

FISCAL LEVERAGING (100 words or less)

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

- A grant from the JHSSF would offer seed funding to leverage future funds from other sources such as Perry Township and/or Court Reform grants.
- 480 volunteer hours, valued at \$12,000 with mediation services from CJAM and social services from SCIHO. (Independent Sector, 2017)
- 120 volunteer IU Maurer School of Law students’ hours with the Tenant Assistance Project and supervision by the clinical professor, valued at \$3,000.
- Monroe County Circuit Court Judges have offered support and in-kind contributions that include:
 - Information about the Tenant Assistance Table in the summons packet with eviction lawsuit notices.
 - Referral of 100% of tenant cases to this project (participation by tenants will be voluntary); and
 - Conference rooms for meetings with computers and telephones.

FUNDING PRIORITIES -- RANKED

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

[x] Yes [] No

NOTE: The purpose of the Tenant Assistance Table is to provide comprehensive legal, mediation, and social services to tenants during eviction hearings. If full funding is not available, we would staff the table once a week instead of twice. However, having the table once per week may make it harder to measure a reduction in evictions.

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

| | <i>Item</i> | <i>Cost</i> |
|------------------------|--|-----------------|
| <i>Priority #1</i> | Tenant Assistance Table twice weekly at the Charlotte T. Zietlow Justice Center | <i>\$15,352</i> |
| <i>Priority #2</i> | Tenant Assistance Table one day per week for 2.5 hours | <i>\$7,676</i> |
| <i>TOTAL REQUESTED</i> | Tenant Assistance Table twice weekly for five hours at the Charlotte T. Zietlow Justice Center | <i>\$15,352</i> |

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 [2015-2019 Consolidated Plan](#), or any other community-wide survey of social service needs.

In the City of Bloomington, 83% of renter households are low-income (16,815 out of 20,030). Seventy-six percent of extremely low-income renters (6,805 households) in the city are extremely cost burdened, paying more than 50% of their income on housing (Source: U.S. Housing and Urban Development [Comprehensive Housing Affordability Strategy](#) data, 2011-2015).

According to Monroe County Circuit Court statistics, there were 719 new eviction cases filed in 2018. Out of those, 339 evictions were granted.

The Tenant Assistance Table offers an essential opportunity to reduce evictions and increase housing stability for low-income renters in the community.

The Tenant Assistance Table will serve the *Consolidated Plan's Strategy 5: Public Service Assistance* (p.3). These priorities call for funding to non-profit organizations that provide a safety net for community members in need.

ONE-TIME INVESTMENT (100 words or less)

Jack Hopkins Funds are intended to be a one-time investment. Please explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), please explain how your project satisfies an exception to the one-time funding rule (pilot, bridge, or collaborative). If you are requesting operational funds that do not satisfy one of the aforementioned exceptions, but your request is being made pursuant to the 2019 allowance for operational funds, please make that clear. If you are requesting operational funding, you must detail your plan for future funding.

The collaborating agencies intend to apply for a Court Reform Grant issued by the Indiana Supreme Court to continue the project. If this pilot demonstrates success, the Court Reform Grant would supply funding from January 1, 2020 and onward. This grant application will be available in November 2019.

LONG-TERM BENEFITS (200 words or less)

Explain how your program will have broad and long-lasting benefits for our community.

Sixty-nine percent of residents are renters in the City of Bloomington. However, Bloomington's high-cost housing market and very low vacancy rate for rental homes often gives the upper hand to landlords. The Tenant Assistance Table will provide clarity and support for renters, particularly low-income households, who are facing eviction proceedings or other housing issues.

Providing comprehensive legal, mediation, and social service direction with trained staffing and information will be a huge improvement over the currently available resources. We anticipate the Tenant Resource Table will help to reduce evictions and provide more housing stability for renters.

OUTCOME INDICATORS (100 words or less)

Please describe the outcome indicators you intend to use to measure the success of your project.

Anticipated Outcomes for the Tenant Assistance Table from July – Dec. 2019:

- 360 tenants served.
- 288 tenants (80%) estimated to come from low-income households.
- 30 Eviction Damages proceedings resolved through mediation (Rough estimate, as this is hard to predict at this time.)
- 100% of eviction hearing days (52 days) with legal, mediation, and social services resources available for tenants.
- 640 hours logged by volunteers and staff from collaborating agencies.
- Hire of a program coordinator who excels at building relationships, recruiting volunteers, connecting low-income clients to resources, and building the capacity of a local nonprofit.

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.

This pilot project will give every tenant in Monroe County at risk of losing their housing access to legal counsel, mediation alternatives, and social services.

Staffing:

- SCIHO's administrative time is exclusively for the new Program Coordinator hire. S/he will be responsible for developing SCIHO's community volunteer program to assist low-income renters, recruiting volunteers, and training them. The additional time to do this is supported by SCIHO's Enterprise Community Partners grant.
- The hourly cost for legal services was set according to amounts the Indiana Supreme Court has approved in previous grants.

Volunteer time:

SCIHO and CJAM will each staff every session of the Tenant Assistance Table with two trained volunteers. Combined with IU Maurer School of Law student volunteers, this project includes \$15,000 in volunteer time.

Outcomes:

- This pilot will help to determine any changes how many eviction cases are dismissed and how many result in agreement, especially if those agreements result in return to housing or voluntary surrender of premises. We will collect this data from Monroe Court Services.
- As landlords and tenants become more aware of mediation and social services available, this may also help to reduce eviction filings.

Why Are the Monroe County Judges Supporting this Effort?

- The Court's goal is to reduce tenant turnover and preserve housing which helps both tenants and landlords. Vulnerable disabled and poor clients are forever barred from state-subsidized or federal housing if they get an eviction on their record, unless they file for bankruptcy.
- Even if these tenants cannot negotiate a dismissal of the eviction, this project can help them get an "Agreed Order," which avoids the black mark of eviction, resulting in easier access to housing for vulnerable tenants for the rest of their lives.
- Even if the tenant has to leave, this project can help them present defenses, and counterclaims against the landlord, educate about move-out, and thus reduce liability,

or help them get security deposits returned so that they can be in a better position to get another home.

- Judge Stafford and Judge Benckart have indicated that they are prepared to reschedule the Thursday morning eviction and damages hearings to Thursday afternoon to provide greater outreach with this project.

Why Can't Pro Bono Lawyers Provide This Service?

These services cannot be accomplished by pro bono services from attorneys. Since almost all attorneys who specialize in landlord-tenant law represent landlords, if they were to provide legal aid for tenants this would produce conflicts of interest against past and future landlord clients.

How Can Mediation Help?

Mediation services between landlords and tenants can help work out solutions to problems that might otherwise result in eviction. Mediation can also help to negotiate damages, such as payment plans for past-due rent and solutions to tenant issues with the rental.

BUDGET

TENANT ASSISTANCE TABLE TO REDUCE EVICTIONS

| Project Sources | Amount |
|---|------------------|
| Enterprise Community Partners grant (SCIHO) | \$2,592 |
| Jack Hopkins Social Services Fund – Collaborative Pilot Grant | \$ 15,352 |
| Total Out-of-Pocket | \$17,944 |
| Project Expenses | Amount |
| Justice Unlocked Legal Aid Attorney <i>7 hrs/week @ \$28/hr for 26 weeks</i> | \$ 5,096 |
| SCIHO Program Coordinator <i>12 hours/week @ \$18/hr for 38 weeks</i> | \$ 8,208 |
| CJAM Staffing <i>4 hours/week @\$25/hr for 26 weeks</i> | \$ 2,600 |
| Computer for SCIHO Program Coordinator | \$ 500 |
| Portable/Mobile Printer & Ink/Office Supplies | \$ 500 |
| Volunteer Training materials | \$ 320 |
| Table Resource Materials | \$ 720 |
| Total Out-of-Pocket | \$ 17,944 |
| <i>Value of in-kind volunteer hours</i> | \$ 15,000 |
| PROJECT TOTAL | \$ 32,944 |
| TOTAL JACK HOPKINS REQUEST | \$ 15,352 |



2019 Tenant Assistance Table Memorandum of Understanding (MOU)

This Memorandum of Understanding (MOU), while not a legally binding document, provides a voluntary agreement to pilot the implementation of a Tenant Assistance Table at the Monroe County Justice Building. The Tenant Assistance Table is a resource table that aims to support tenants facing eviction proceedings, reduce evictions, and support housing stability for renters in the City of Bloomington and Monroe County, particularly low-income households.

Overall Project Goals, Services and Outcomes

The goal of the Tenant Assistance Table is to reduce evictions and advance housing stability. This MOU shall arrange for the provision of a resource table providing social services, mediation, and legal guidance to coincide with scheduled Small Claims Court eviction and damages hearings, for approximately five hours weekly. These hours are currently scheduled from 8:30 am to 11:00 am on Thursday and Friday mornings at the Charlotte T. Zietlow Justice Center, 301 N College Ave, Bloomington.

TERM ONE

The agreement shall be in effect from July 1, 2019 through Dec. 31, 2019. It may be canceled at any time by any party with written 30-day notification.

TERM TWO

South Central Indiana Housing Opportunities will administer and oversee the on-going program planning and execution of the Tenant Resource Table to include the following services:

1. Hire a Program Coordinator;
2. Schedule volunteers;
3. Compile and manage table resource materials; and
4. Administer and manage the program revenues in accordance with the program budget.

TERM THREE

Program Partners Roles and Responsibilities

1) All partners

- a) Advertise and promote the Tenant Assistance Table.
- b) Adhere to applicable grant and reporting requirements, including but not limited to the City of Bloomington's Jack Hopkins Social Services Fund.

1) Legal Guidance

- a) *Justice Unlocked* will provide an Indiana licensed and trained attorney to each session of the program who will:
 - i) Provide legal analysis and advice.
 - ii) Ensure the integrity and accuracy of the program's legal activities.
 - iii) As necessary, oversee legal service volunteers.
- b) *Tenant Assistance Project - Indiana University Maurer School of Law* will continue its operations during the Fall 2019 semester to:
 - i) Assist in recruiting and organizing volunteer law students to staff the Tenant Assistance Table between September 15 and November 15, 2019.
 - ii) If an extension is needed, this service can continue between January 15 and April 15, 2020.
 - iii) Provide training to law students that can be shared with other Tenant Assistance Table volunteers.

2) Mediation

- a) *Center for Justice and Mediation (CJAM)* will provide trained volunteers that will:
 - i) Assist in facilitating constructive negotiations between landlords and tenants.
 - ii) Assess need for damages mediation and/or coaching.
 - iii) Provide mediation services.
 - iv) Refer tenants to applicable community resources and social services.

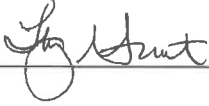
3) Social Services

- a) *South Central Indiana Housing Opportunities* will provide trained community liaisons that will:
 - i) Refer tenants to community resources and social services to support housing stability.
 - ii) Direct tenants to resources on the Housing4Hoosiers website and *Renting in Indiana: A Handbook for Tenants and Landlords*.
 - iii) Guide tenants on how to properly document communication with landlords.
 - iv) Support tenants with the tools and information to help them to solve housing problems.

Collaborative: South Central Indiana Housing Opportunities, CJAM,
Justice Unlocked & Tenant Assistance Program

Liz Grenat
Executive Director
Community Justice and Mediation Center

Deborah Myerson
Executive Director
South Central Indiana Housing Opportunities



4/1/2019

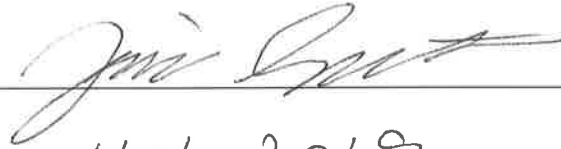
4/1/2019

Date

Date

Jennifer Prusak
Associate Clinical Professor of Law
Director, Nonprofit Legal Clinic
Tenant Assistance Project
Indiana University Maurer School of Law

Jamie Sutton
Executive Director
Justice Unlocked



4/1/2019

4-1-2019

Date

Date

Collaborative: South Central Indiana Housing Opportunities, CJAM,
Justice Unlocked & Tenant Assistance Program
DEPARTMENT OF THE TREASURY

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

Date: **DEC 23 2015**

SOUTH CENTRAL INDIANA HOUSING
OPPORTUNITIES CORPORATION
1007 NORTH SUMMITT ST
BLOOMINGTON, IN 47404-3172

Employer Identification Number:
47-1012649
DLN:
17053167316045
Contact Person:
RONALD D BELL ID# 31185
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
March 28, 2014
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

REC'D DEC 28 A.M.

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. 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.

Letter 947

SOUTH CENTRAL INDIANA HOUSING

Sincerely,

A handwritten signature in black ink, appearing to read 'J. Cooper', written in a cursive style.

Jeffrey I. Cooper
Director, Exempt Organizations
Rulings and Agreements

Letter 947



Collaborative: South Central Indiana Housing Opportunities, CJAM,
Justice Unlocked & Tenant Assistance Program
South Central Indiana Housing Opportunities

STATEMENT OF ACTIVITY

January - December 2018

| | TOTAL |
|---------------------------------------|----------------------|
| Revenue | |
| City Grant Revenue | 12,718.85 |
| NAP Tax Credit Revenue | 1,580.00 |
| Private Donations | 5,528.77 |
| Private Foundation Grant Revenue | 9,469.00 |
| Public Donations | 4,500.00 |
| Sales | 850.00 |
| Total Revenue | \$34,646.62 |
| GROSS PROFIT | \$34,646.62 |
| Expenditures | |
| Administrative Expense | |
| Accounting Fees | 1,697.87 |
| Admin Support Fees | 3,460.00 |
| Legal & Professional Services | 113.75 |
| Membership Dues | 125.00 |
| Office Supplies | 139.18 |
| Other General Expense | 500.00 |
| Rent & Lease | 404.00 |
| Training | 542.40 |
| Travel | 35.45 |
| Website Maintenance | 149.00 |
| Total Administrative Expense | 7,166.65 |
| Advertising & Marketing | 405.24 |
| Bank Charges & Fees | 89.93 |
| Insurance | |
| Directors and Officials Insurance | 833.00 |
| General Liability Insurance | 1,620.00 |
| Worker's Compensation Insurance | 364.00 |
| Total Insurance | 2,817.00 |
| Payroll Expenses | |
| Taxes | 5,743.09 |
| Wages | 74,925.54 |
| Total Payroll Expenses | 80,668.63 |
| Program Delivery Expense | 280.00 |
| Communications Plan | 775.00 |
| Housing 4 Hoosiers | 3,645.79 |
| Total Program Delivery Expense | 4,700.79 |
| Total Expenditures | \$95,848.24 |
| NET OPERATING REVENUE | \$ -61,201.62 |
| NET REVENUE | \$ -61,201.62 |



Collaborative: South Central Indiana Housing Opportunities, CJAM,
Justice Unlocked & Tenant Assistance Program
South Central Indiana Housing Opportunities

STATEMENT OF FINANCIAL POSITION

As of December 31, 2018

| | TOTAL |
|--|----------------------|
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| 1000 TOTAL BUS CHK (5913) | 8,212.58 |
| Total Bank Accounts | \$8,212.58 |
| Accounts Receivable | |
| 1100 Accounts Receivable (A/R) | 0.00 |
| Total Accounts Receivable | \$0.00 |
| Total Current Assets | \$8,212.58 |
| Other Assets | |
| Construction Work in Progress | 19,468.62 |
| Total Other Assets | \$19,468.62 |
| TOTAL ASSETS | \$27,681.20 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Current Liabilities | |
| Accounts Payable | |
| 2010 Accounts Payable (A/P) | 0.00 |
| Total Accounts Payable | \$0.00 |
| Other Current Liabilities | |
| 2130 Payroll Liabilities | |
| 2131 Federal Taxes (941/944) | 1,713.84 |
| 2132 Federal Unemployment (940) | 0.00 |
| 2133 IN Income / Local Taxes | 242.16 |
| 2134 IN Unemployment Tax | 0.00 |
| Total 2130 Payroll Liabilities | 1,956.00 |
| Direct Deposit Payable | 0.00 |
| Line of Credit | 25,000.00 |
| Loan Payable | 20,000.00 |
| Total Other Current Liabilities | \$46,956.00 |
| Total Current Liabilities | \$46,956.00 |
| Total Liabilities | \$46,956.00 |
| Equity | |
| Retained Earnings | 41,926.82 |
| Net Revenue | -61,201.62 |
| Total Equity | \$ -19,274.80 |
| TOTAL LIABILITIES AND EQUITY | \$27,681.20 |

Collaborative: South Central Indiana Housing Opportunities, CJAM,
Justice Unlocked & Tenant Assistance Program

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JAN 05 2016

JUSTICE UNLOCKED INC
1209 NORTH MAPLE ST
BLOOMINGTON, IN 47404-0000

Employer Identification Number:
47-4312377
DLN:
26053762001085
Contact Person:
CUSTOMER SERVICE ID# 31954
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
509(a)(2)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
October 16, 2015
Contribution Deductibility:
Yes
Addendum Applies:
No

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.

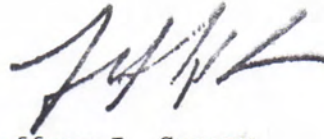
If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. 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.

Letter 5436

JUSTICE UNLOCKED INC

Sincerely,

A handwritten signature in black ink, appearing to read 'J. Cooper', written in a cursive style.

Jeffrey I. Cooper
Director, Exempt Organizations
Rulings and Agreements

Letter 5436

**Mary Ellen Diekhoff, Presiding Judge
Division V**

Monroe Circuit Court

301 North College Avenue
Bloomington, Indiana 47404-3865
(812) 349-2615

Elizabeth A. Cure, Judge
Division I

Christine Talley Haseman, Judge
Division III

Holly M. Harvey, Judge
Division VI

Judith C. Benckart, Judge
Division VIII

Valeri Haughton, Judge
Division II

Catherine B. Stafford, Judge
Division IV

Stephen R. Galvin, Judge
Division VII

Darcie L. Fawcett, Judge
Division IX

Bret Raper, Commissioner

April 1, 2019

Jack Hopkins Social Services Fund
City of Bloomington
401 N Morton Street
Bloomington, IN 47404

Re: Support for Tenant Assistance Table

Chair Chopra & Committee:

We are pleased to offer our support for South Central Indiana Housing Opportunity's collaborative proposal for a **Tenant Assistance Table**, a joint initiative with legal, mediation, and social service agencies that can provide timely guidance to low-income renters at risk of losing their housing to relevant local resources.

We are proud to be working with SCIHO and multiple other community partners as part of the Eviction Assistance Working Group. It is our goal to lessen the burden of evictions on both tenants and landlords. Eviction hearings are held twice a week in Monroe County – one session heard by Judge Benckart and one session heard by Judge Stafford.

The collaborative **Tenant Assistance Table** will be an important innovation to reduce evictions and increase housing stability. From a court's perspective, many tenants coming into eviction hearings do not understand what services are available in the community to help them, do not understand what legal defenses may be available to them, and do not understand they can negotiate with their landlords to avoid an eviction being on their record. Many landlords do not wish to negotiate with tenants unless the tenants can find the financial resources to catch up on rent. It is in the best

interests of everyone in our community—not only tenants and landlords, but also our society as a whole—to help our residents avoid eviction wherever possible.

We enthusiastically support the presence of a twice-weekly Tenant Assistance Table at the Justice Building to reach low-income renters with direct assistance. It will provide a much-needed resource that can help to overcome problems caused by housing instability in the City of Bloomington.

Sincerely,



The Hon. Judith Benckart
Monroe Circuit Court VIII



The Hon. Catherine Stafford
Monroe Circuit Court IV



MAURER SCHOOL OF LAW

INDIANA UNIVERSITY
Bloomington

April 1, 2019

To the Jack Hopkins Social Services Fund Review Committee:

I am pleased to offer my support for South Central Indiana Housing Opportunity's collaborative proposal for a Tenant Assistance Table in my role as faculty supervisor for Indiana University Maurer School of Law's Tenant Assistance Project.

The Tenant Assistance Project (or, "TAP") is a volunteer project staffed by Maurer law students and supervised by a licensed attorney. Created in 2007, TAP is at the Monroe County Justice Building once each week during the academic semester to provide limited legal guidance to tenants immediately before their eviction hearings. TAP volunteers try and help tenants develop defenses to their eviction actions whenever possible. In situations when a defense is not possible and eviction is unavoidable, TAP volunteers try and refer tenants to available resources.

In my role as TAP's supervisor, I have participated in the regular meetings of the Eviction Assistance Working Group. At these meetings, participating agencies have discussed the need for resources that can help renters with housing stability and avoid evictions. As part of this, we have discussed how a weekly resource table that takes what TAP has started and builds on it so that it isn't limited to court hearings during the law school semester, and is staffed not just by first- and second-year law students but by experienced attorneys and agencies well-equipped to handle tenants' many needs, would be an important means to provide support to renters. We are excited to have TAP partner with this joint initiative with legal, mediation, and social service agencies that can provide timely guidance to low-income renters at risk of losing their housing to relevant local resources.

It is my opinion that the Tenant Assistance Table will be an important innovation to reduce evictions and increase housing stability. I enthusiastically support this proposed Tenant Assistance Table at the Monroe County Justice Building to expand the resources currently offered by TAP. I believe it will provide a much-needed resource to overcome problems caused by evictions and housing instability in the City of Bloomington.

Sincerely,

A handwritten signature in black ink, appearing to read "Jennifer S. Prusak".

Jennifer S. Prusak
Associate Clinical Professor of Law
Director, Nonprofit Legal Clinic
Faculty Supervisory, Tenant Assistance Project
Indiana University Maurer School of Law



CJAM

205 S. Walnut, Suite 16
Bloomington, IN 47404
www.cjamcenter.org

March 29, 2019

Re: Letter of Support

Dear Jack Hopkins Committee:

The Community Justice and Mediation Center (CJAM) writes this letter in strong support of the Tenant Assistance Table Collaborative Project. CJAM plays a unique community role by providing efforts to resolve housing and other conflicts in way that fosters mutually acceptable solutions that helps prevent eviction, damaged credit, and the general cycle of homelessness for individuals and families. The neutral mediation process also provides needed supports for landlords. On average, 40% - 45% of our community mediation cases involve landlord tenant conflicts, including threats of eviction. Last fall, Monroe Circuit Court IV Judges Harvey and Haughton, reached out to CJAM to explore the possibility of expanding our work with their court by providing mediation services at the eviction and damages hearings. It was recommended that we wait to begin services until the new Circuit Court judges were in place. We were very excited when Judges Stafford and Benckart convened a group of legal and social service providers to tackle the issue of providing a comprehensive approach to meeting the needs of tenants and landlords in eviction proceedings.

Strength of the Collaborative:

Judges Stafford and Benckart provided strong and efficient leadership with the group quickly identifying gaps, the need for *continuum of supports*, offering collaborative strategies and resources to deal with those gaps. CJAM has had positive experiences working with all the lead partners in the project. We currently partner with South Central Indiana Housing Opportunities to provide training for their tenant/landlord education series and we strongly support the development of the Housing Navigators program. We regularly make referrals to Justice Unlocked, and the IU Tenant Assistance Project. CJAM has a long history of working with the courts and with the other members of the work group; District 10 Pro Bono Project, Indiana Legal Services, IU Legal Services, and, the Shalom Center. In addition, we also work closely with HAND and other social service providers.

Bloomington is a vibrant and active community that has prioritized *sustainable housing security* as a critical need. We are confident that this collaborative, with support from Jack Hopkins, will leverage the strengths of each partner, promote building stronger public/private partnerships, *and* encourage active civic engagement and citizen involvement through volunteerism. Tenants, landlords and our community will benefit. Thank you for this opportunity.

Sincerely,

Liz Grenat

Liz Grenat
Executive Director