

City Council Finance Committee

Meeting Agenda

September 19, 2024

4:00 PM

Virtual Meeting

Members of the public are welcome to attend and give comments remotely; however, the in-person meeting may continue even if technology issues prevent remote participation.

- You can call in to **+1 408 638 0968 or 833 548 0282 (Toll Free)**, Webinar ID **#878 7340 6932**.
- You can log in via your computer. Please visit the City's website here to link to the meeting: www.louisvilleco.gov/council

The Council will accommodate public comments during the meeting. Anyone may also email comments to the Council prior to the meeting at Council@LouisvilleCO.gov.

- I.** Call to Order
- II.** Roll Call
- III.** Approval of Agenda
- IV. ITEM 1** - Approval of Minutes, August 15th, 2024 (pg 3/251)
- V.** Public Comments on Items Not on the Agenda
- VI. ITEM 2** – Review of 2025/26 Non-Profit Grant Applications, (pg 11/251)– Samma Fox, Interim City Manager, Ryder Bailey, CPA
Finance Director

VII. ITEM 3 – Budget Update - (pg 234/251) – Samma Fox, Interim City Manager, Ryder Bailey, CPA Finance Director

VIII. ITEM 4 – Monthly Revenue and Sales Tax Report, (pg 236/251) – Jess Zeas, Sales Tax Accountant-Auditor, Melissa Lundgren, Sales Tax, Accountant-Auditor, Travis Anderson, Revenue and Sales Tax Manager

IX. Finance Director Updates

X. Discussion/Future Items for Next Committee Meeting, October 17th, 4:00PM

- Preliminary Assessed Valuation
- Chandler Investment Presentation - Economy & Investments
- Monthly Revenue & Sales Tax Reports

XI. Adjourn

City Council Finance Committee

4:00 PM | Thursday, August 15, 2024

Virtual Meeting via Zoom

Regular Meeting

Call to Order – Councilmember Hoefner called the meeting to order at 4:01 PM and took roll call.

Committee Members Present: Yes Councilmember Hamlington
Yes Councilmember Hoefner
Yes Councilmember Kern

Staff Present:

Samma Fox, Acting City Manager
Maria Ostrum, Interim Director of Finance
Meredyth Muth, City Clerk
Genny Kline, Deputy City Clerk
Mahyar Mansurabadi, Financial Analyst
Jess Zeas, Sales Tax Accountant / Auditor
Kim Baker, Accounting Manager
Travis Anderson, Revenue & Sales Tax Manager
Melissa Lundgren, Sales Tax Accountant / Auditor
Julie Glaser, Senior Accountant
Adam Blackmore, Director of Parks, Recreation and Open Space
Kurt Kowar, Director of Public Works
Ligea Ferraro, Executive Administrator
Rafael Gutierrez, Chief of Police
Paulina Bennett, Director of Information Technology
Robin Brookhart, Interim Director of Human Resources
Sharon Nemechek, Director of Cultural Services
Rob Zuccaro, Director of Community Development
Diane Kreager, Payroll

Others Present:

Councilmember Fahey
Councilmember Dickinson

Approval of Agenda:

Councilmember Kern made a motion to approve the agenda. Seconded by Councilmember Hamlington. Agenda was Approved.

Approval of July 18, 2024 Meeting Minutes:

Councilmember Kern made a motion to approve the minutes. Councilmember Hamlington seconded. The meeting minutes were approved.

Public Comments on Items Not on the Agenda: None

Mid-Year CIP Report:

Senior Accountant Glaser presented the Mid-Year CIP report. The report was included in the meeting packet.

Committee Comments: None.

Public Comments: None.

Mid-Year Financial Update:

Financial Analyst Mansurabadi presented a mid-year financial update to the committee. The report was included in the meeting packet.

Committee Comments: None.

Public Comments: None.

Budget Update:

The City Manager thanked city staff for all the work done to provide this update on the FY 2025-2026 proposed budget. Interim Finance Director Ostrom and Interim City Manager Fox presented a recap of the budget calendar, items discussed at the budget retreat and where it was left off at the retreat, the general fund budget gap, the general fund revenue and expense changes and a summary of those changes. The Financial Analyst gave a review of the parks fund structural imbalance and capital needs and a proposed path forward. Capital Project fund actions and net changes were presented to the committee. The revised capital projects fund was also presented. The presentations were included in the meeting packet.

Committee Comments:

Councilmember Hamlington asked if ballot measure 2C was included in the sales tax numbers. Interim Finance Director Ostrom commented that this part of the presentation reflects general fund only.

Councilmember Hoefner commented that budget year to date sales tax revenue is still down against budget. He asked to confirm that the adjusted revenue amount is accurate. Interim Finance Director Ostrom responded that while the 2-year budget expectation was to be up by 8%, staff have closely reviewed actual sales tax revenues in 2024 plus projections and believe that \$12.4M is a very supportable number.

Councilmember Hoefner wants to ensure the numbers presented are driven by objective analysis and not driven by the need to find \$1M to make the budget seem balanced. Interim Finance Director Ostrom commented that, as an example, the Franchise Tax-Xcel Energy estimated number was based on previous budgets whereas the adjusted amount is truly where we are looking to be in 2025.

Councilmember Hoefner asked for the list of one-time expenses referenced in the presentation. Interim Finance Director Ostrom will provide that list to the committee.

Councilmember Kern asked if not filling the open position in Community Development would affect the two-week response time to Marshall Fire construction. The Director of Community Development commented that the city did previously over-hire both the building inspector and plan review positions.

The person in the open position got another job and we haven't filled it. Community Development has maintained the response time with this position open. He noted that the permitting volume is much less than previously and while inspection volume is really high right now it is expected to go down.

Councilmember Kern expressed concern over Community Development charging credit card fees, expecting that it wouldn't result in \$50K of revenue. She commented that the city might see people using different forms of payment which might have the effect of increased costs rather than saving money. She expressed appreciation to staff for continuing to do more with less while still providing services to the community.

Councilmember Hamlington asked for confirmation that the removal of the Recovery and Resilience expansion and EDI Manager position from this budget cycle doesn't mean those positions would be indefinitely off the table. Interim City Manager Fox responded that the removal of the Recovery and Resilience expansion doesn't reduce any positions; these were additional items proposed above and beyond what we are currently doing in this department. She noted that these positions were hired without dedicated funding to do the work and that there is still a net increase for the Recovery and Resilience program. She also commented that a determination on the EDI position is up to council and the organization, noting that it is currently a vacant position. City Staff feel we can have the value of EDI translating through our services without having a dedicated position. If we get into 2025 and the future looks brighter, we can do a budget amendment to look at the items that have been reduced.

Councilmember Hamlington asked about where the increased fund transfer to the Parks fund is coming from, noting that the committee worked very hard to ensure that ballot measure 2C did not negatively impact our parks and she didn't recall the amount requested being part of the original conversations. Interim Finance Director Ostrom responded that a lot of staff are paid out of the parks fund and market and merit adjustments will increase the budget needed for those positions. It's possible that the full picture wasn't known at the time the original discussions took place. She added that the parks fund does a lot to ensure the community has places to go that are in in good working order, noting that costs have increased, and they can't do the work with the 50/50 split of tax revenue. The Director of Parks, Recreation and Open Space commented that what is shown is the shortfall as a result, as was discussed as we went into the ballot measure. We had 6-7 years of good operations spending history data as it relates to the 3/8 tax with the overall allocation historically being split with 54-56% going to the Parks fund and 44-46% going to the Open Space fund. The overall allocation of the tax ended up being closer to a 50/50 split between Parks and Open Space when a few high dollar capital projects were included. The 2024 budget was proposed without the assumption that the percentage split would be 50/50 between Parks and Open Space. When the committee and council received the budget amendment delineating the separate accounts for Parks and Open Space to allow for allocation of the revenues into separate funds, the shortage in the parks fund is a result of using a 50/50 split of the revenue between Parks and Open Space. This cuts the parentage out of the Parks operating budget and increases the Open Space operating budget. There is not currently a reasonable alternative to offset the 50% split and the most reasonable approach is to increase the general fund for this budget.

Councilmember Hoefner reviewed what was discussed when the committee originally discussed the funds, noting that we took entire general fund transfer that had been going to Parks and Open Space and

allocated it entirely to parks going forward. His recollection is that this was projected to cover Parks as a structurally balanced fund going forward. He feels that adding another almost \$300K to the Parks fund feels like a big increase, that he doesn't feel was we discussed when the split of the funds was determined. The Director of Parks, Recreation and Open Space commented that his understanding is that that the General Fund transfer has always gone entirely to the Parks fund, noting that changing of the amount is a result of the escalator as included in the financial policy. Staff will research and follow up on this with the committee. Councilmember Hoefner commented that it would be helpful to understand what was missed when this was reviewed a few months ago as there were extensive conversations on how to deal with the fund transfer and such a large shortfall was not anticipated. The Financial Analyst added that one of the reasons which hasn't been mentioned in relation to this item is the slowing of sales tax growth which does impact these numbers. The \$290K gap is a result of looking at the actual sales tax revenue we've been seeing and then estimating from those numbers.

Councilmember Kern commented that we had some big capital fund increases in Parks and asked if something got impacted in the general fund because of additional staffing or anything in parks into 2025? The Director of PROS responded that there isn't anything that we are aware of.

Councilmember Hoefner agreed that adjusting the overhead allocation makes sense in the medium to long-term, likes the idea of looking at credit card fees subject to Councilmember Kern's comments to ensure projections include a possible switch to alternative methods of payment. Councilmember Hoefner doesn't have strong feelings on the newspaper publication of ordinances, since most folks find that information on the internet. He suggested that fees in general seem like a place we might want to look to see if there are any fees that have not been adjusted and whether any should be adjusted for 2025. The Interim City Manager commented that there are some fees that staff can review as part of the consideration and asked if the committee's direction is for staff to continue to find a way to bridge the \$500K gap.

Councilmember Kern responded that we need to find a way to close the \$500K gap, and she wants to avoid closures and elimination of existing positions. Councilmember Hamlington agreed with Councilmember Kern in focusing on maintaining our services and staff as much as possible and not negatively impacting retention of staff. Councilmember Hoefner agreed and underscored that city staff are the most important long-term asset, and he feels no one is looking for cutting staff positions or pay. The Interim City Manager commented that staff will continue to work on finding a structural balance to the budget while maintaining services and staff while considering fees and efficiencies as potential solutions.

Councilmember Hoefner asked what the dollar amount is for Parks capital projects. The Financial Analyst responded that, for 2025 it's about \$578K.

Councilmember Hamlington asked for information on the benefits and risks of moving parks capital projects to the CIP fund. Is there a possibility that the parks projects would be de-prioritized because they would be competing with all CIPs? The Financial Analyst responded that, if left in the parks fund the projects could not be completed because there is no money in the fund for them. Moving parks capital projects into the CIP fund will allow council to review parks projects with other CIP projects and prioritize accordingly. Councilmember Hamlington asked if any fund is able to similarly move capital projects from

its designated fund to the CIP fund. The Interim Finance Director responded that any governmental fund can be put into the CIP fund if that's how council desires to see, prioritize, and review it.

Councilmember Kern asked if we are short \$300K for the Parks fund after moving several projects into the CIP fund, where are the big projected increases in 2025 that aren't there in 2024. She doesn't feel they saw a \$300k gap when the tax division was decided for ballot measure 2C. The Financial Analyst responded that, at the time we did not have projections for personnel costs for 2025; the other factor is that sales tax growth has not been what was anticipated when the discussions occurred. In addition, general increases for ongoing expenses have created this delta. Councilmember Kern commented that this is a large personnel increase. I know we have big irrigation projects that will impact some of our parks, but those appear in the CIP fund. She asked if we have an increase cost in water that goes to parks or did the \$1M from the tax revenue decrease from lack of sales tax revenue. The Director of PROS responded that the gap is bigger because of a shortfall in tax revenue. Outside of the personnel cost increase, the proposed budget would be the same budget currently allocated for 2024 operating costs. He noted that there will be a slight increase for contracted mowing next year due to a required new contract in 2025 and that the majority of this shortfall is a combination of lagging sales tax, an increase in personnel and benefit expenses with existing staff, and the impacts being fully realized outside of what was projected with the alignment of the 3/8% tax being split 50/50 instead of at the historical division of the tax revenue as previously mentioned. Councilmember Kern asked if, with the funds we have and the shortage we have, are there some general fund areas PROS can cut back on in 2025/26 or are there parks costs the city can cut back on. The Director of PROS responded that cutting back on costs will cut service, noting that this is approximately 7-10% of the operating budget. It's something staff has been and continue to look into with the City Manager to assist with the alignment. The bigger, longer-term discussion of getting through the 2025/26 structural balance and how it relates to service afterwards, depending on business growth or economic vitality.

Councilmember Hoefner commented that, in the detail for 25 parks budget vehicle equipment replacement jumps to 162k this year and he asked for more information on this topic. The Director of PROS responded that costs for replacement vehicles is related to a standard expected lifespan of fleet vehicles and the proposed budget for vehicle replacement is created in concert with Public Works as we age out of our equipment. He suggested that, if we are asked to evaluate the operating budget, we could start with fleet costs. Councilmember Hoefner asked staff to look at the possibility of reviewing fleet reduction options to reduce costs.

Councilmember Hamlington commented that she strongly believes that the voters who approved of ballot measure 2C did not anticipate negative impacts on Parks by this tax. She expressed concern that Council will hear from the community if service is reduced. She suggested if fleet costs could be evaluated, it could be useful. She asked if there was going to be money left from the close out after balancing the tax split. Councilmember Hoefner commented that it was the projection and asked if that is still true. The Financial Analyst responded that the Minimum Reserve Policy had to be met so we took the old fund and split the fund balance between Parks and Open Space to meet the minimum reserve for the parks fund. After the minimum reserve was met, there was no funds remaining. The Director of PROS commented that there is the ability to evaluate the reserve policy since it is an internal policy, if the finance committee wants to consider policy evaluation as an option.

It was noted that the originally proposed Affordable Housing line item was removed from the budget as there was not a specific project to be funded.

Councilmember Hamlington asked what the reduction in the paving program includes. The Director of Public Works explained street scores and the goal to meet a pavement condition index of 70, which is what most cities target as a reasonable standard.

Councilmember Kern asked for more detail on the \$3.5M maintenance line item and she expressed concerned that there isn't at least \$1M set aside for Marshall Fire. The Financial Analyst commented that there is a slide coming in the presentation where each project is listed.

There was a discussion around solar projects, grants, and HVAC upgrades. The Director of Public Works noted that the largest costs come from the recreation center systems which are at end of life. Solar for the recreation center is part of the DOLA grant

There was a discussion around the total 2025 CIP expense requests for pavement, decarbonization related projects, south street underpass and downtown vision plan projects, maintenance costs and \$700K in new projects. Councilmember Kern asked for further clarification in the documentation which shows that the CIP revised fund is met by 2024 carryover and grant funding.

It was noted that the South Street underpass construction project will be a multi-year cash flow. Councilmember Dickinson asked to understand the LRC funding amounts listed. It was noted that the LRC voted to allocate \$1M towards the South Street underpass project and \$9M to the Downtown Vision Plan. Both projects are currently at high level early design phase.

Councilmember Kern asked how much of the Downtown Vision Plan project will be spent in 2025. The Director of Public works commented that he is trying to bundle the projects together and it's currently anticipated that maybe 10-25% of the projected costs will be spent in 2025.

Councilmember Hamlington asked if the timing of the Downtown Vision Plan and South Street Underpass projects is dictated by grant money. The Director of Public Works responded that the underpass project does have timing restrictions due to the grant funding, adding that on a \$10M project, the longer it takes to commence a project you can expect costs to increase. He also noted that sequencing the underpass with the future 42 project is important because the underpass is the next logical phase of future 42 and that the future 42 projects will build on the underpass.

There was a discussion around the maintenance items listed in the presentation.

There was a discussion around the items listed on the new items slide.

Councilmember Hoefner asked for clarification on a summary of the revised CIP plan. The Financial Analyst commented that, for 2025, the listed projects can move forward with the funding currently available. This

presentation shows the changes based on feedback from the budget retreat and these projects will fit within the scope of the 2025 CIP funding.

Councilmember Hoefner asked if there will be additional funding left over in the CIP fund. Staff will research and provide a list to the committee of the \$18.2M to indicate the source of the funds, e.g. from fund balance, bonds, grants, and taxpayer money, and whether there will be fund balance left to move into 2026. As well as information on if any 2025 CIP will be paid out of fund balance or ongoing revenue.

Councilmember Hoefner commented that he's pleased to hear that the revision presented works and he feels some of the things that will be cut are priorities. He asked staff to consider ways to bring these items back into the budget. He asked if it would be possible to move some projects out of the General Fund into the CIP fund to find the \$500K, for example police cars could be considered CIP instead of general fund expenditures.

Councilmember Kern asked the Interim City Manager to comment on affordable housing funding related to grant funding that is being allocated by the City of Louisville. The Interim City Manager responded that she believes the councilmember is referring to the private activity bonds and that the city is working with the County Housing Authority to allocate \$1.2M to Lafayette for a project underway for affordable housing.

Public Comments:

Councilmember Fahey asked if the \$290K is an increase over the traditional transfer usually done from general fund to parks. The Financial Analyst responded that it would be an increase.

Councilmember Fahey commented that EV vehicle initial costs may be high but long-term maintenance is lower.

Helen Moshak, Louisville resident, commented that the budget process is very challenging. She expressed concern that the budget priority list is a target list and seeing cuts close to \$400k from sustainability budget and decarb plan, \$2M to affordable housing, and eliminating the EDI Manager position after only 18 months is concerning to her. She also asked that open space be included in the CIP fund for the city.

Cathern Smith, Louisville resident, agreed with the concerns expressed by resident Moshak. She expressed concern on affordable housing cuts, sustainability cuts and what they do to the sustainability program. In reference to EDI, she asked if we can we rotate responsibilities, so we fill the position by having a member of staff assigned to perform EDI functions to show that EDI is a priority. She also expressed concern that the guidance in the city charter incorporated with what the city is doing with open space. She feels historically open space has been underfunded and would like to see a plan developed where we are meeting the obligations under the city charter.

2024 Q2 Revenue, Sales and Bag Tax Report:

This item was not covered due to lack of time.

Finance Director Updates: None

Closing Questions/Comments from the Committee: None

Items for the Next Regular Meeting, scheduled for September 19, 2024, 4:00-6:00 PM:

- Budget Update
- Review/Recommendation of 2025/26 Non-Profit Grants Applications
- Monthly Revenue & Monthly Sales Tax Reports

Councilmember Kern motioned to adjourn the meeting. Councilmember Hamlington seconded.

Adjourn: The meeting adjourned at 6:11 PM

**SUBJECT: REVIEW OF NON-PROFIT GRANT APPLICATIONS FOR
2025/2026**

DATE: SEPTEMBER 19, 2024

**PRESENTED BY: RYDER BAILEY, CPA, FINANCE DIRECTOR
SAMMA FOX, DEPUTY CITY MANAGER**

SUMMARY:

Finance Committee is being presented the 2025/26 Non-Profit Grant Applications for review and funding recommendations.

Staff has summarized all requests in the Table 1, found on next page. Applications for each Agency by page number are referenced in the furthest left column.

We received 11 applications, totaling \$61,500 (2025) and \$62,000 (2026) in requests. The program is oversubscribed by \$13,500 and \$11,800 in 2025 and 2026, respectively.

The 2025-2026 Operating Budget currently includes \$48,000 (2025) and \$50,200 (2026) for grants/contributions to non-profit agencies for each respective year. Found under account 101121-538420.

No new applicants from the previous grant cycle were received. Furthermore, three previous awardees did not apply.

A potential recommendation philosophy could be awarding entities their request, or no greater than 50% of previously awarded funding. This methodology would also include \$5,000 in increased utility assistance program administered by Sister Carmen, which was recently approved by Council in August. \$2,200 in 2026 is currently not encumbered.

City Council will award 2025 and 2026 funds at a City Council date yet to be set later this year.

Table 1: Summary and History of Non-Profit Requests

City of Louisville, Colorado Non-Profit Grants & Contributions 2023 Through 2026											
Page	Organization	2023 Request	2023 FC Rec	2024 Request	2024 FC Rec	2025 Agency Request	% Increase 2025 Request to 2024 Award	2025 Rec [1]	2026 Agency Request	% Increase 2026 Request to 2024 Award	2026 Rec [1]
14	Association for Community Living	1,000	1,000	1,000	1,000	1,000	0%	1,000	1,000	0%	1,000
165	Boulder County Cultivate (Formerly CareConnect)	3,000	2,000	3,000	2,000	3,000	50%	3,000	3,000	50%	3,000
31	Boulder Valley Women's Health Center	5,000	5,000	5,000	5,000	7,500	50%	7,500	7,500	50%	7,500
181	Community Food Share	5,000	2,500	5,000	2,500	10,000	300%	3,750	10,000	300%	3,750
218	Imagine! - Developmental Disabilities Center	1,500	1,500	1,500	1,500	10,000	567%	2,250	10,000	567%	2,250
308	Impact on Education	3,000	2,000	3,000	2,000	5,000	150%	3,000	5,000	150%	3,000
264	Intercambio Uniting Communities	1,000	1,000	1,000	1,000	1,500	50%	1,500	1,500	50%	1,500
297	Louisville Community Food Bank	2,500	1,000	2,500	1,000	2,500	150%	1,500	3,000	200%	1,500
141	Safehouse Progressive Alliance for Nonviolence	2,500	1,500	2,500	1,500	3,000	100%	2,250	3,000	100%	2,250
44	Sister Carmen Community Center [2]	15,000	14,500	15,000	14,500	15,000	3%	20,000	15,000	3%	20,000
110	Tru Community Care	3,500	1,500	3,500	1,500	3,000	100%	2,250	3,000	100%	2,250
	Clinica Family Health Services	7,000	7,000	7,500	7,500	Did Not Apply	na	-	Did Not Apply	na	-
	Coal Creek Meals on Wheels	3,000	2,500	3,000	2,500	Did Not Apply	na	-	Did Not Apply	na	-
	Dental Aid	4,000	2,000	4,000	2,000	Did Not Apply	na	-	Did Not Apply	na	-
	Totals	57,000	45,000	57,500	45,500	61,500		48,000	62,000		48,000
	Budget					48,000			50,200		
						(13,500)			(11,800)		

[1] Recommendation funds the Entity's full request, or up to 50% increase over prior award, if they requested a larger amount.
[2] 2025 and 2026 each include \$10,000 earmarked for the Utility Assistance Program (Previously \$5,000 had been earmarked annually, the increase is due to elimination of Senior Water Rebate program)

ATTACHMENTS:

1. Summary of Requests
2. 2025/2026 Non-Profit Grant Applications – Combined
3. Impact on Education Application (e-sign protected, unable to combine)

City of Louisville, Colorado
Non-Profit Grants & Contributions
2023 Through 2026

Page	Organization	2023 Request	2023 FC Rec	2024 Request	2024 FC Rec	2025 Agency Request	% Increase 2025 Request to 2024 Award	2025 Rec [1]	2026 Agency Request	% Increase 2026 Request to 2024 Award	2026 Rec [1]
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308	Impact on Education	3,000	2,000	3,000	2,000	5,000	150%	3,000	5,000	150%	3,000
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110	Tru Community Care	3,500	1,500	3,500	1,500	3,000	100%	2,250	3,000	100%	2,250
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	Totals	57,000	45,000	57,500	45,500	61,500		48,000	62,000		48,000
	Budget					48,000			50,200		
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[2] 2023 and 2026 each include \$10,000 earmarked for the Utility Assistance Program (Previously \$3,000 had been earmarked annually, the increase is due to elimination of Senior Water Rebate program)



GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization Association for Community Living in Boulder & Broomfield Counties
Program Title or "General Operating" General Operating
Contact Person Kimberly DeGraff Title Development Director
Address 624 Coffman St. Longmont, CO 80501
Telephone 303-527-0008 E-Mail kdegraff@aclboulder.org
Program Duration (if applicable) Begin ongoing End _____
Anti-Discrimination Policy (Required) Yes X No _____ Other _____

Grant Amount Requested for **2025 and/or 2026** \$ 1,000. **2025** \$ 1,000. **2026**

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. **Organizational background:** What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

Mission: The Association for Community Living promotes and protects the rights of people with intellectual and development disabilities to be included as a natural and integral part of community life.

The source of information used to verify the need for our services is the 2018 IDD Needs Assessment done by Boulder County HHS. The identified needs from this Assessment are outlined in the Assessment Report Brief. The ACL fills the following gaps prioritized in this report: Housing & Health, Advocacy, Self Advocacy, Engagement, & Social Connections, Community Education and IDD Awareness.

The Association for Community Living (ACL), an advocacy organization, was founded in Boulder in 1962, incorporated as a chapter of The Arc in 1974, and is the affiliated chapter of The Arc of the United States serving Boulder and Broomfield Counties. We were created by families of people with intellectual/developmental disabilities (IDD), and the people we serve provide leadership on the ACL Board of Directors to this day. The ACL has been instrumental in achieving the right to access public education and community-based support services, for people with IDD, in our community. These rights are now protected by law, yet without advocacy services, people with IDD still experience significant barriers to access. Without independent advocacy it is very difficult for people with IDD to access complex and fragmented health and long-term care systems, public assistance programs, public schools, higher education systems, employment opportunities and the community. People with IDD are excluded from community arts, music, recreation and leisure activities and it is difficult for people with IDD to feel welcome at community activities. Our vision for the future is that communities welcome and value the contributions and participation of people with IDD. Many of the problems people with IDD face are created by system change and require hundreds of hours of individual advocacy to resolve. In 2024, case management agencies will change dramatically, a process which has been very challenging in the communities who are already making the transition. While change is inevitable, it can leave out the voices of the people and families whose lives are most impacted by it. ACL is helping our community to voice their ideas, hopes and concerns, and to understand and brace for change. The following goals reflect our strategic planning to achieve our mission and vision and are rooted in the Social Determinants of Health, pillars of family stability & healthy thriving communities. The ACL strives to...

- **Advocate** for and **protect** the human rights of people with IDD
- **Amplify** the voices of people with IDD
- **Actively Engage** families and allies in the lives of people with IDD
- **Support** people with IDD to create fulfilled lives
- **Change** cultures, attitudes and systems through partnership
- **Share** expertise and advocate in the community
- **Model** professionalism, adaptability and responsiveness to the needs of people with IDD

2. **Program description:** What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

Individual Advocacy, Group Advocacy & Systems Advocacy.

The ACL serves people with IDD who face challenges with system design flaws that perpetuate a lack of access to health care, long-term care, higher incidence of chronic health problems, poor educational outcomes, lack of technology access, low employment rates, high poverty, homelessness, and high incarceration rates. Many need support with communication, learning, staying healthy, and living independently. However, the systems providing support have many barriers to access, rarely accommodating a person's disability. This creates inequity. Many people with IDD are also medically vulnerable. Many receive services and are disproportionately represented in our prison & juvenile corrections systems.

ACL supports children in BVSD and SSVSD. The ACL provides individual, group and systems advocacy. We also work with professionals and the community. Advocacy can be short term, sporadic, or ongoing.

ACL Individual Advocacy Activities include:

- Individualized advocacy comprised of consultation, meeting attendance, individualized planning, crisis mitigation, individualized training/coaching for people with IDD, families, professionals
- Educate people with IDD about relevant issues and inform about local resources

ACL Group & Systems Advocacy Activities include:

- Create opportunities for people with IDD to meet other people in the community
- Act as a liaison to community opportunities
- Conduct public policy/systems advocacy
- Resource and facilitate Self-Advocates Becoming Empowered (SABE)
- Provide training and educational presentations to disability and non-disability organizations and community connections
- Sponsor and consult with community organizations
- Participate regularly in community networking and interagency groups
- Cultivate relationships with organizations that support our mission
- Collaborate with local school districts around events and information sharing
- Facilitate parent network and self advocate groups

Expected results:

1. People with IDD are as independent as they want to be. They plan for their future and make decisions about their lives.
2. People with IDD have access to justice when their rights are threatened.
3. People with IDD will expand and strengthen the comfort and skills needed to access, utilize, and enjoy community resources and events.
4. Parents of children with IDD are well informed about special education and able to advocate for their children.
5. The community will be disability-aware, welcoming, and accessible to people with IDD.
6. Families and allies of people with IDD understand and navigate systems, and create a plan for the future that promotes independence.
7. People with IDD, their families and allies influence systems, laws and policies to improve their quality of life.

3. **Program measurements:** Provide the following information for the program/activities for which funding is requested:

- Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

Approximately 3,000 people with IDD receive services in Boulder County. Our target population

is people, in Boulder & Broomfield Counties, with IDD, from birth to end of life, regardless of gender, income level, or ethnicity. When family members are involved they are included in the advocacy process to develop support systems and skills for self-advocates.

In 2023, the ACL served 251 unduplicated people with IDD with individual advocacy, with 7724 advocacy hours. We also served 321 family members. Recently, a deeper connection between individual advocacy and systems advocacy has organically emerged at the ACL. Currently all of our advocates are doing both individual and systems advocacy. Of the 251 people, 138 adults were served. 113 were children served to improve access to hybrid & virtual learning and to advocate for special education to be provided safely in school. In 2023, in addition to Individual Advocacy, we provided Group and Systems Advocacy through Support Groups, Community Capacity Building, Interagency Collaborations, Public Policy, Membership Activities and Trainings. In 2023, the ACL provided 275 group activities with 3662 total attendance. Of the 275 activities in 2023, 45 were Parent Network Groups, 73 were Self Advocate groups, 37 were Caminando Juntos, 36 were for Cultivating Relationships, 15 were trainings and 24 were Public Policy efforts where our participation was to advocate on behalf of people with IDD. Systems advocacy was focused on state-wide Case Management Redesign, participating in the Boulder County Mil Levy Council and local and state-level advocacy done by self advocates that participate in SABE (Self Advocates Becoming Empowered) and Speaking For Ourselves. 25 Residents of Louisville with IDD and 78 family members received individual advocacy with 145 advocacy hours and 13 Louisville families participated in our groups.

Qualitative measures: How will you measure the success of this program/activity? To measure progress we use a customized database that connects our advocacy efforts to the 21 domains of the Self Sufficiency Matrix. We analyze this data annually. This analysis shows us the tangible impacts of our work and patterns that we use to make informed program development decisions and that give us empirical verification that we are effective in our work and that we have an impact on our community. We evaluate our programs on an ongoing basis to assess our success in meeting goals and to create new data architecture. We are balancing the black and white of our data analysis with the stories of the people we serve who breathe life into the work that we do and whose input enables us to co-create solutions to the barriers people with IDD face.

We define success as access to general education, housing, health care, employment and the opportunity to participate fully in the experiences of life and to contribute to your community. Success for the people we serve is having the ability to navigate systems and advocate as independently as possible for their needs. We expect to accomplish our mission through the activities we provide. As a result of our new database updates, we are able to capture Group and Systems Advocacy with increasing specificity and accuracy. This attendance is not unduplicated because the same person can attend multiple events. We do not collect extensive demographic information on event attendees. We strive to measure to outcomes, beyond the indicators of program participation, beyond how many people we served.

For the past nine years, we used the Self-Sufficiency Matrix to measure the progress of our advocacy activities across 21 domains. For six years, the data showed that although there was progress overall in a positive direction, it is in very small increments from vulnerable to safe and thriving is elusive. Since 2019, we have reported on how many people we work with in each domain and how much we work in each domain. A review of the data suggests that the person-centered work of the ACL covered all 21 domains in 2023. We worked with the most people in the domains of child education, support systems and housing.

4. **Evaluation:** If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

In 2023, the ACL was instrumental in including people with IDD in the planning of community

mental health services. Through advocacy with people struggling to access services, DD mil levy council participation, and public testimony to our County Commissioners, the ACL has been invited to the table as the Behavioral Health Road Map is implemented for all Boulder County residents. Our goal remains that these services for all, fully accommodate people with IDD who have been routinely excluded in the past.

Ongoing work in the court and jail system has led to people accessing services and supports as they leave jail. Community based agencies have stepped up their response and people are less likely to wait for release because community service and supports were not accessible.

The ACL team advocated at the state and local level about Case Management Re-Design. Case management services are changing across CO. Thanks to our part in state advocacy, people will be able to choose a case management agency rather than be forced to use the one in the area they live. Many other improvements were made to how case management agencies will operate with community advisory committees including community members to plan for improving the quality of case management.

ACL's Housing Committee, made up of Board, staff and community members, has made significant progress on inclusive supportive housing. Nationally our communities lack supportive housing that is accessible, safe, financially attainable and inseparable from the community in which it nests. The ACL Housing Committee have led the conversation about housing. We have met with our County Commissioners, City Councils, Housing Authorities, developers, support agencies, other parent/advocacy networks, the community centered board, the state of CO Dept of Health Care Policy and Financing and CO Housing and Finance Authority. We know we are on the brink of change when the right people are in the room talking about the right issues. The Housing Committee has now assembled a coalition that includes the right people and it is a diverse group. Parents are often in the lead when it comes to the conversation about supportive housing – their love and concern for their children extends beyond their own lifetimes and it is a powerful force for change. Change is finally coming to our community and while developing inclusive housing takes time, we predict that we will see new projects unfold in the next 3-5 years.

Our current challenge is succession planning. Our 15 person team has a wealth of experience, a wide breath of knowledge and valuable future potential. We also see on the horizon the retirements of key leadership members over the next 8 years. The ACL's leadership's intention to provide avenues of career development and personal growth opportunities in order to retain our highly qualified mid-career leaders.

CITY OF LOUISVILLE, COLORADO GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

5. Leadership:

- How many people serve on your Board of Directors and how many of these are Louisville residents?

From year to year the ACL has between 10-15 members of our Board of Directors. In 2024, we have 14 Board members. Four of them are family members of people with IDD and 4 members are people with IDD themselves, self-advocates. We currently do not have any Louisville residents serving on our board.

- How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

The ACL employs 14 people, totaling 12.75 FTE. Two of our staff members are Louisville residents.

- Does your organization utilize volunteers? If yes, provide a brief description of their role and

the approximate number of volunteer hours donated in a year.
We are fortunate to have membership from which we can fill our volunteer needs which are mainly event support.

- Who will be responsible for the administration of the program or service?

Our ED provides executive direction and administration for our programs. Our Program Director is the direct supervisor for our programs including supervision of the advocates facilitating the programs.

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

There is no other organization with expertise on IDD that is also capable of multiple system advocacy and navigation. ACL advocacy is not limited to the IDD system; we work across all systems to address the multiple facets of marginalization people with IDD experience. We provide expertise and collaborate with over 150 organizations and agencies. Organizational collaboration extends to several groups in the state including Legal Center for Older People and People with Disabilities, Independent Living Centers, and the Colorado Cross Disability Coalition. These relationships have developed through collaboration on large training projects and in the course of providing support to people with IDD which often requires intensive, multi-disciplinary team work. This has led to strong ties between the ACL and our local Community Centered Board-ACMI Avenues, Boulder Valley School District, St. Vrain Valley School District, The Autism Society of Boulder, other Arcs, Community clinics, adult system service providers, Senior Services, Adult and Child Protective Services and the Justice system. We participate on the Boulder County Human Service Alliance, an organization of over 70 human service nonprofits that coordinate their efforts to leverage their collective impact locally. Levels of collaboration include: cooperation, coordination, collaboration and integration and these range from informal relationships to becoming business partners with shared responsibilities and risks. There are many people with IDD who are unknown to the IDD system who rely upon other agencies to meet their needs such as basic needs agencies, health care agencies, and County Departments. ACL is the vital link in the safety net for this population and can connect people with a wide range of resources. We are also often the open door to long-term sustainable supports and services for people with IDD, providing advocacy to people seeking eligibility for Medicaid waiver programs.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

In the last year we have developed a new JEDI Charter that states: The ACL is an equal opportunity organization, and is committed to the principles of justice, equity, diversity and inclusion. ACL does not to discriminate in employment of staff, selection of volunteers, Board membership, or the provision of its services on the basis of gender, race, color, national origin, age, creed, religion, disability, ancestry, genetic information, sexual orientation, marital status, parental status, or any other basis protected by applicable laws. This policy applies to all employment practices and terms & conditions of employment.

ACL's COMMITMENT TO JUSTICE, EQUITY, DIVERSITY, & INCLUSION Justice at the ACL means advocating for and upholding the rights of people with IDD, particularly those with historically marginalized or underserved intersectionalities and/or lived experiences. Justice is at the core of the ACL's work, addressing systemic inequalities and working towards a community and greater society where everyone is treated with dignity and respect. Diversity at the ACL means actively welcoming and representing different knowledge, perspectives, intersectionalities and lived experiences among its board members, committees and greater organization in order to be an effective change agent in the lives of people with IDD. Equity is

central to the ACL's advocacy efforts, striving to eliminate barriers and provide equitable access to services, resources, and opportunities for all members of our community. Inclusion is a core value at the ACL, guiding its efforts to create welcoming and supportive environments for individuals with IDD and their families. The ACL is committed to fostering a culture of inclusion where everyone feels welcome and included.

We are grateful for the support of the City of Louisville and all support makes a difference.

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Local County Government Contracts	166,581	12%
arc Thrift Store Distribution	1,124,581	79%
Contributions	40,000	3%
Membership	800	<.05%
Grants	94,000	6%
**These Numbers are for each year		
Not for both years totaled**		

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature

Ailsa Wonnacott

Agency Director

303-527-0888

Telephone Number

awonnacott@aclboulder.org

E-Mail Address

Signature

Ben Rhodes

Board President

303-527-0888

Telephone Number

info@aclboulder.org

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.

Kansas City Service Center

Kansas City MO 64999

In reply refer to: 0256432380

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BODC: TE

ASSOCIATION FOR COMMUNITY LIVING IN

BOULDER COUNTY

624 COFFMAN ST

LONGMONT CO 80501

Employer ID number: 84-0637899

Form 990 required: Yes

Dear Taxpayer:

We're responding to your request dated Dec. 13, 2023, about your tax-exempt status.

We issued you a determination letter in April 1976, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Section 509(a)(2).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific

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ASSOCIATION FOR COMMUNITY LIVING IN
BOULDER COUNTY
624 COFFMAN ST
LONGMONT CO 80501

time).

Thank you for your cooperation.

Sincerely yours,

A handwritten signature in dark ink, appearing to read "Steve M. Brown". The signature is fluid and cursive, with the first name "Steve" and last name "Brown" clearly distinguishable.

Steve M. Brown, Operations Manager
Operations 3-CIN



ACL Board of Directors 2024

Mario Sanchez

Longmont, CO
msanchez@aclboulder.org
Term Exp. 12/31/24
Software Product Manager
Treasurer & Finance Committee

Elena Ciaravino

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Term Exp. 12/31/2024
Program Manager
SABE & Community Grant Committee

Karen Zeid

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Term Expired 12/31/24
Realtor & Interior Design
Housing & Outreach Committees

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Term Exp. 12/31/2025
Head Start
VP-Nominating & Governance Committees

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Writer/Administrative Assistant
Community Grants Committee

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Term Exp. 12/31/2026
Service Provider
Co-President
Governance & Community Grants Committees

Diane Malone

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Term expires 12/31/24
Retired Project Manager
Co-President

Teri Reindel

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Term Exp. 12/31/24
Retired Organization Development
Housing & Community Grants Committees

Kim Decker

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Term Exp. 12/31/2025
Direct Support Professional
Governance & Finance Committees

Jen Ochs

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Term Exp. 12/31/2026
Disability Advocate-Ms. Wheelchair CO-2023
Housing Committee

Becky Toliver

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btoliver@aclboulder.org
Term Exp. 12/31/2026
Administrative Assistant-Real Capital Solutions
Secretary & SABE

Robert Enderson

Longmont, CO
renderson@aclboulder.org
Term Exp. 12/31/2024
Dog Day Care
SABE Represen



ASSOCIATION FOR COMMUNITY LIVING
The Arc Serving Boulder & Broomfield Counties

ACL Annual Report & Organization Video Links 2024

Each of the following video links describes an aspect of our work that have a distinct impact on our community and inspires people to support our mission:

Belonging is Everything-The impact of the work of the ACL

<https://www.youtube.com/watch?v=bnfFi3gquo0>

What inspires us: The ACL Team

ACL Team members share the parts of our advocacy work that inspire and motivate them the most.

<https://youtu.be/JPFuU6UIUEg> (edited)

Programa Caminando Juntos

Una madre en nuestro programa Caminando Juntos habla sobre las formas en que ACL la ha ayudado a ella y a su familia.

A mother in our Caminando Juntos program talks about the ways ACL has helped her and her family.

<https://youtu.be/q2vVqvmx63g>

Self Advocates Becoming Empowered (SABE) want you to join them!

Members of SABE name the 12 reasons you should join Self Advocates Becoming Empowered.

<https://youtu.be/bhhESgt0its>

ReWriting Our Worlds Writing Group

Members of ACL's monthly writing group for parents or siblings of children or adults with IDD talk about their experiences with the group. The monthly drop-in writing group meets on Zoom. Each session starts with a warm-up prompt, then do a longer write with a more complex prompt that usually includes techniques for improving your writing. After writing, members listen respectfully to the writers read their work. We rewrite our worlds as parents of kids (of any age) with disabilities!

https://youtu.be/axh5_Oy0eJA

ACL's Board of Directors 2022

The ACL's Board of Directors is counting the reasons why you should join them on the **Board or a Committee and help advocate for people with IDD in Boulder & Broomfield Counties, Colorado.**

<https://youtu.be/8q5qInzvg2s>



GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization	<u>Boulder Valley Health Center</u>		
Program Title or "General Operating"	<u>Subsidized Reproductive Health Services and Community Education</u>		
Contact Person	<u>Erin Wilson</u>	Title	<u>Grants Coordinator</u>
Address	<u>2855 Valmont Road, Boulder, CO 80301</u>		
Telephone	<u>(303) 442-5160</u>	E-Mail	<u>erin@bvwhc.org</u>
Program Duration (if applicable)	Begin <u>1/1/2025</u>	End	<u>12/31/2025</u>
Anti-Discrimination Policy (Required)	Yes ☒	No ☐	Other <u> </u>
	<u>2025</u>	<u>2026</u>	
Grant Amount Requested for 2025 and/or 2026	<u>\$7,500</u>	<u>\$7,500</u>	

Boulder Valley Health Center Narrative

City of Louisville Grant Application for Non-Profit Organizations

- 1. Organizational background: What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?**

Boulder Valley Health Center (BVHC) is an independent, non-profit reproductive and sexual health clinic that has served the Boulder community for 51 years. The organization was founded in 1973 as the first abortion clinic in the state and has since expanded to provide additional services including testing for sexually transmitted infections (STIs), birth control services, cancer screenings, menopausal therapy, and gender affirming care. Through a long-standing partnership with Boulder Valley and St. Vrain Valley School Districts, BVHC also provides comprehensive, evidence-based sexual health education to thousands of local teenagers each school year.

BVHC's mission is to provide reproductive and sexual health services, abortion, and education to all people, including those who face barriers to accessing high quality and equitable health care. To this end, we offer sliding fee scales and screen for Social Determinants of Health (SDOH), actively working to remove barriers to ensure that all people can access our essential health and wellness services.

All program ideas reflected in this application are based on patient and student data as well as insights from our BVHC team. Our organization fills critical needs in the community and beyond, and chose these specific programs based on inequities we have identified.

- 2. Program description: What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.**

The proposed programs will increase the availability of essential specialized services in the greater Boulder community. By providing access to Menopausal Transition Therapy, Gender Affirming Care, and PrEP Services, regardless of a patient's ability to pay, BVHC is helping to increase the health and wellness for all people who require these services throughout the community. By providing evidence-based Sexual Health Education to local school districts, without a cost to families or schools, BVHC is ensuring that all local students, regardless of their exposure to these concepts outside of school, will have access to accurate information that helps them better understand their bodies, consent, and safety.

Gender Affirming Care (GAC) has been offered at BVHC since 2011. Last year, BVHC increased outreach efforts and hired a provider who specializes in GAC to revamp this important program, which had dwindled due to staff turnover during the pandemic. In 2024, one program goal was to increase new GAC patients by 30%. This year, we will build off this goal by retaining at least 80% of established patients.

Menopausal Transition Therapy has been a part of the services offered at BVHC for many years. This year, through provider training and outreach activities, we seek to expand this programming. Through outreach efforts, we plan to grow our number of menopausal care patients, improving their quality of life and bringing attention to a widely ignored, often stigmatized, and misunderstood topic. As with all services at BVHC, a generous sliding fee scale will be available to allow all patients to access this important care.

PrEP is a preventive medication that can be taken by anyone who is sexually active to prevent the transmission of HIV. This medication has not previously been offered at BVHC and, due to the advocacy work of our new Clinic Director and a partnership with the drug maker Gilead, these services will be launched with substantial or full financial assistance available on September 1, 2024. We aim to see 3 new patients in the first month of services and increase to 130% growth by the end of 2025.

Sexual Health Education is provided by BVHC's education team to thousands of local teens each year through a partnership with Boulder and St. Vrain Valley School Districts. This important programming is comprehensive, evidence-based, and meets Colorado State standards. This year we aim to reach more students with the team's newest lesson, Media and Porn Literacy. This curriculum was developed by our team last year by popular request and was piloted in a handful of schools in BVSD. The goal this year is to teach more teens this important lesson, helping them understand the ways that media influences our beliefs about our bodies and sexuality.

3. Program measurements: Provide the following information for the program/activities for which funding is requested:

Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

We quantitatively evaluate all our clinic programs by querying our electronic medical records system at least quarterly to look for both positive trends and obstacles associated with the growth and service goals we set. These topics are discussed at least monthly when our entire clinic staff meets together. More often, these concepts are discussed one on one when our Clinic Supervisor and Clinic Director meet with their team members.

For the specific clinical programs outlined, we will query new and established menopausal therapy, GAC, and PrEP patient numbers each month to assess growth of these programs. When grant contracts are finalized in January, we also review all programs with clinic staff to ensure proper documentation as it pertains to our outcomes. After some lessons learned, we have carefully selected outcomes that can be tracked seamlessly in our medical records system. Monthly checks will allow us to continue to fine tune our process and address anything that could interfere or change our set goals.

Menopausal Transition Care is for anyone experiencing symptoms and seeking treatment. Most commonly, these symptoms occur in those who identify as female in their mid to late forties. This program will serve patients local to Boulder County, encompassing patients of various race and socioeconomic status representative of the local population.

Gender Affirming Care is for any patient who feels a disconnect between their assigned gender and their gender identity. These patients may be any age, gender, race, socioeconomic status, and local or from a neighboring state or county where this care is not available. For purposes of this program, BVHC will track local patients separately.

PrEP can be prescribed to any sexually active person who screens negative for HIV. In particular, this medication is for those who are higher risk for HIV exposure, including IV drug users, men who have sex with men, and trans females.

All 3 of the above categories are part of our Reproductive Health (RH) care. This year, we anticipate seeing about 78 patients from Louisville for RH services. We anticipate about 5% growth each year above these numbers, so approximately 81 in 2025 and 85 in 2026, respectively. It is possible that the increased focus on these programs will attract more patients from Louisville to BVHC in the future. These patient numbers will be collected and analyzed for trends as we evaluate our current and future programming.

Sexual Health Education is for middle to high school students in BVSD and SVVSD. These teens are local to Boulder County, ages 13-18, and are of varying race and socioeconomic status representative of the local population. In Louisville, these lessons are delivered at Louisville Middle School and Monarch High School. From the 2022-2023 school year to the 2023-2024 school year, the students reached in Louisville increased from 185 to 368.

This table shows the total number of Louisville patients seen for RH clinic visits at BVHC in the first half of 2024, along with their racial and ethnic self-reported data:

Total	White	Black	Asian	Native American	Hispanic	Not Hispanic	Other	Unknown
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Qualitative measures: How will you measure the success of this program/activity?

For qualitative data, we collect direct patient and student feedback after every interaction. Student surveys are reviewed after each specific school session is completed and clinic surveys are reviewed weekly by our Director of Compliance. If any concern is brought up, these are addressed immediately by phone call.

4. Evaluation: If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

Last year, we experienced unprecedented growth in our GAC and Sexual Health Education programs. The increased focus on menopausal care and PrEP services are new for this year.

As usual, program staff will track clinical services through review of electronic medical records to understand trends in our unduplicated patients receiving these specialized services. In addition to new patients, we will also track returning patients. For our Sexual Health Education programs, we will track students' knowledge gained by assessing pre- and post-lessons delivered. We will also evaluate these lessons based on student and educator feedback, which we solicit at each interaction.

5. Leadership:

• How many people serve on your Board of Directors and how many of these are Louisville residents?

At present, we have 9 people serving on our Board of Directors, none of whom live in Louisville. Our current members live in Golden, Lyons, Broomfield, Denver, Longmont, Lafayette, and Denver.

• How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

BVHC currently employs 29 staff. Of these, 23 are full-time, meaning 32 hours or above each week. We have 6 part-time employees, ranging from 16-31 hours each week. In addition, BVHC contracts 2 abortion providers, who each work 8 hours per week. None of our employees currently live in Louisville.

- **Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.**

BVHC currently uses volunteers to help with outreach activities, our I&E Committee, and for the planning of our annual fundraiser. Our Board Members are also volunteers. Volunteers participate in onboarding relative to the service they will provide and are partnered with the department they will serve. We estimate that we will have 1000 volunteer hours donated this year.

- **Who will be responsible for the administration of the program or service?**

Our Clinic Director, CEO/CMO, and Education Programs Manager will be responsible for the administration of the programs described in this application.

- 6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.**

GAC-Boulder Community Health, the CraneTCenter, and Rocky Mountain Equality

MTC- Mental Health Partners, The Menopause Society

PrEP-Boulder County Aids Project, CU Boulder Student Health, Gilead Advancing Access

Sexual Health Education-Boulder and St. Vrain Valley School Districts, CU Boulder

- 7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.**

This year, BVHC seeks to remodel and expand our current Valmont location after 51 years of serving the community. As such, we are applying for a very large grant through Boulder County (Worthy Cause) to support these efforts. The other amounts reported here are funds we have applied to through the Cities of Boulder, Longmont, and Lafayette, for support of the same programs outlined in this application for residents of these cities.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Boulder County-Worthy Cause	\$692,500	38%
City of Boulder-Human Services Fund	\$200,000	11%
City of Longmont-Human Services Fund	\$50,000	2.7%
City of Lafayette-Human Services Fund	\$25,000	1.3%
Federal Funding	\$102,565	5.6%
State Funding	\$97,755	5.3%

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Savita Y Ginde MD MPH
Savita Y Ginde MD MPH (Aug 26, 2024 15:29 MDT)

Signature

Savita Y. Ginde MD MPH

Agency Director

(303) 442-5160

Telephone Number

savita@bvwhc.org

E-Mail Address

Edna Johnson
Edna Johnson (Aug 26, 2024 15:35 MDT)

Signature

Edna B. Johnson

Board President

(864) 678-0850

Telephone Number

ednabjohnson@yahoo.com

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.

OFFICE OF THE SECRETARY OF STATE
OF THE STATE OF COLORADO

CERTIFICATE OF FACT OF GOOD STANDING

I, Jena Griswold, as the Secretary of State of the State of Colorado, hereby certify that, according to the records of this office,

BOULDER VALLEY WOMEN'S HEALTH CENTER INC.

is a

Nonprofit Corporation

formed or registered on 07/30/1973 under the law of Colorado, has complied with all applicable requirements of this office, and is in good standing with this office. This entity has been assigned entity identification number 19871260566 .

This certificate reflects facts established or disclosed by documents delivered to this office on paper through 07/22/2024 that have been posted, and by documents delivered to this office electronically through 07/23/2024 @ 10:26:59 .

I have affixed hereto the Great Seal of the State of Colorado and duly generated, executed, and issued this official certificate at Denver, Colorado on 07/23/2024 @ 10:26:59 in accordance with applicable law. This certificate is assigned Confirmation Number 16229199 .



A handwritten signature in black ink that reads 'Jena Griswold'.

Secretary of State of the State of Colorado

*****End of Certificate*****

Notice: A certificate issued electronically from the Colorado Secretary of State's website is fully and immediately valid and effective. However, as an option, the issuance and validity of a certificate obtained electronically may be established by visiting the Validate a Certificate page of the Secretary of State's website, <https://www.coloradosos.gov/biz/CertificateSearchCriteria.do> entering the certificate's confirmation number displayed on the certificate, and following the instructions displayed. Confirming the issuance of a certificate is merely optional and is not necessary to the valid and effective issuance of a certificate. For more information, visit our website, <https://www.coloradosos.gov> click "Businesses, trademarks, trade names" and select "Frequently Asked Questions."

BVHC Board of Directors Table-2024

<u>Name</u>	<u>Position</u>	<u>Term End</u>	<u>Profession</u>	<u>Email</u>
Jess Pieklo	Secretary	Dec 2025	<u>Journalist,</u> <u>Attorney</u>	612-308-7714
Lisa Quillici	Treasurer	Dec 2025	<u>SVP and</u> <u>Founder</u>	617-872-0248
Edna Johnson	Board Chair	Dec 2025	<u>Retired</u>	864-678-0850
Corey Kalil	Member	Dec 2025	<u>Recruiter</u>	
Paula Stone Williams	Member	Dec 2026	<u>Public</u> <u>Speaker,</u> <u>Pastor</u>	516-658-3024
Sarah Ellis	Member	Dec 2026	<u>OBGYN</u>	303-941-3975
Ann-Clarke Bailey	Member	Feb 2027	<u>Counselor,</u> <u>Wellness</u> <u>Consultant</u>	404-345-5608
Savita Ginde	CEO/Non-Voting		<u>CEO/CMO</u>	720-289-8699
Jessica Newman	Member	Aug 2027		



GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, **August 26, 2024**

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization	Sister Carmen Community Center		
Program Title or "General Operating"	General Operating		
Contact Person	Kristen Bohanon	Title	Chief Development
Address	655 Aspen Ridge Dr., Lafayette, CO 80026		
Telephone	303-665-4342 x103	E-Mail	kristen@sistercarmen.org
Program Duration (if applicable)	Begin	Ongoing	End
Anti-Discrimination Policy (Required)	Yes	X	No
			Other
Grant Amount Requested for 2025 and/or 2026	\$	2025 15,000	2026 15,000

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. Organizational background: What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

Mission: Sister Carmen Community Center (SCCC) provides assistance to residents of Lafayette, Louisville, Superior, and Erie who are in need, without discrimination.

Strategies: Sister Carmen Community Center (SCCC) is a non-religious agency that has served the community since 1978. Our origins stem from Sister Carmen Ptacnik, a Catholic nun who came to help the people of Lafayette, Colorado in 1970's. The community embraced and continued her humanitarian efforts, eventually becoming the organization we are today, offering critical resources to thousands of individuals and families a year. In 2012, we officially became a Family Resource Center (FRC), providing a safe accessible place for individuals and families to connect to a multitude of comprehensive and coordinated services. We take a holistic approach to addressing the needs of people experiencing poverty by equipping them with the tools they need, allowing for the best opportunity for success as they take steps towards stability and self-reliance.

We are the designated provider of comprehensive basic need services and resources to the most vulnerable residents in the cities of Lafayette, Louisville, Superior, and Erie. Through our family-centered programming, we promote health, safety, well-being and economic stability by meeting one-on-one with the people we serve. Our aim is to improve the quality of life for our participants, and assist them in recovering from challenging experiences and crisis by providing timely and meaningful wrap-around support in these areas:

- 1) Ensure the residents of East Boulder County and Erie have access to basic needs including nutritious food, hygiene items, clothing, necessary household goods, connections to healthcare and mental health support, and more.
- 2) Help prevent homelessness and improve access to stable housing by offering mortgage and rent assistance, utility assistance, and connections to housing programs and resources.
- 3) Support participants in advocating for themselves and their families to attain economic stability and, through resource and referral, help them gain access to additional supportive community programs (such as employment, childcare, life skills, work skills, etc.).
- 4) Empower individuals by offering them the skills and resources they need to succeed through family and community educational opportunities including best practice parenting strategies, digital literacy classes, leadership and civic engagement, and support groups.
- 5) Offer a range of nationally recognized professional development trainings to both internal and external human service professionals and stakeholders in an effort to improve the knowledge and skills of our organization's members as well as our partners.

Need: As many of the government programs created in response to the COVID pandemic ended last year – Emergency Rental Assistance Program, SNAP maximum allotment benefits, child tax credits – we have seen firsthand the negative impact on our community. The total number of households served increased by 13% in 2023 compared to 2022, and the number of visits to our food bank increased by 27%. At the same time, we have seen a decrease in individual and food drive donations as grocery prices have increased over the year. Our holiday fundraising efforts were diminished compared to previous years—likely due to the state of the state of economy.

We also are on the cusp of a housing crisis – affordable housing in Boulder County was already

challenging to find, but after the Marshall Fire and pandemic, we are seeing it become even more challenging. FMR in Boulder County increased 9% in 2023, the eviction docket is growing, and wages continue to be stagnant in comparison. We are also seeing less flexibility and understanding from landlords, as we saw earlier on in the pandemic. SCCC continues to have a 163% increase in households provided assistance and a 267% increase in rental assistance dollars from pre-pandemic. This last year, due to funding limitations, we were only able to accommodate approximately 50% of those requests. Unfortunately, while the need remains high we will not have the funds that ERAP has had or that we had in the height of the pandemic to meet the true need.

Our community has also experienced multiple traumatic events in the past several years – pandemic, King Soopers shooting in Boulder, Marshall Fire & Wind Event – as well as experiencing the youth mental health crisis. Community connection, building protective factors, resource/referral connection, and having a safe space and person to listen and support is needed more than ever. SCCC provides this, and was highlighted by the community during a community engagement report presentation and survey at the end of 2021: “Nonprofits...they are our rock stars. We need to continue supporting them or increase support...they were our frontline workers last year and during recovery...Latinx community rely a lot on nonprofits...they were able to survive thanks to the nonprofits...” <https://assets.bouldercounty.gov/wp-content/uploads/2021/11/ARPA-Steering-Committee-Preliminary-Engagement-Report-Final-.pdf>

As the only safety net organization in our area, continued funding is critical to supporting community members so they can continue to live, go to school, play, work, and stay in this community. More community members will need ongoing supportive services/family development in order to do so and work towards self-reliance, and our organization will need the staff resources/capacity to continue to meet the unprecedented need.

2. **Program description:** What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

As an FRC serving primarily low-income individuals and families, our wrap-around, coordinated approach is woven throughout our three main program areas (details outlined below):

Advocacy: We provide families with direct advocacy services: giving them guidance, information, resources and support to assist them in meeting their basic needs and addressing their long-term goals towards self-reliance. Our Advocates are committed to strengthening individual, family, and community relationships through one-on-one guidance that is culturally competent, and centered on the strengths and needs of the entire family.

Advocates encourage and provide resources to increase participants' knowledge and connection to a variety of supportive programs including: financial planning and budgeting, parenting, housing, legal advice, English language classes, job coaching and resume assistance, and enrollment in healthcare and other public benefits. Advocates help prevent homelessness by evaluating participants on a case-by-case basis to determine if they qualify for direct financial assistance with their rent, mortgage or utility bill. We offer a variety of additional direct supports including bus tickets, vouchers to our thrift store, and vision assistance.

Nutrition & Healthy Living: An important aspect of regaining stability is consistent access to nutritious food, necessary medical care and mental health counseling. Sister Carmen provides these supportive services that can stop the downward spiral of a crisis situation so that families are not faced with the decision about whether to buy food, pay rent, or attend to their health.

- Food Assistance: Our food bank is open five days a week and distributed over 1.27 million pounds of food to over 2,200 households in 2023. Households can visit up to 3 times a month and we get up to 250 visits a week. Participants meet with one of two Bilingual advocates who can introduce them to our self-choice model and connect individuals to any other resources they may need.
- Healthy Living: We offer Cooking and Nutrition classes in both English and in Spanish, which help participants learn how to make healthy balanced meals on a budget and utilize items from our food bank. We have a Community Garden that supplies over 1,000 of fresh produce for the food bank and hosts activities for adults and their children to learn about growing and healthy fresh foods. Free weekly Zumba and Yoga classes and free bikes also encourage participants to live an active lifestyle.
- Healthcare Referrals: We partner with St. Benedict Health and Healing Ministry for basic health screenings, blood pressure and diabetes tests. Other community partners include Dental Aid, Clinica Family Health, and Boulder Valley Women's Health Center. Two part-time Mental Health Partners therapist work onsite exclusively with SCCC participants. Additionally, SCCC partners with Benefits in Action and Community Food Share to provide public benefits application support.

Community and Family Education: to support families feeling empowered, we offer them the skills and resources they need in order to make positive changes both at home and in the community. We offer in-person childcare programs that run concurrent with the adults for all of our classes. All courses are free, available in English and Spanish (we also offer language justice translation), and food is provided if they're offered during meal times:

- Nurturing Parenting Program: An evidence-based 12-week course for adult parents and pre-parents that is family-centered, trauma-informed and designed to empower individuals and families with new parenting knowledge, beliefs, strategies and skills that are proven to reduce childhood abuse and neglect.
- Circle of Parents: evidence-informed model that provides a friendly, supportive community led by parents and other caregivers where parents are the experts. Parents and caregivers meet weekly to share support, tips or advice in a safe space with those in their communities.
- Active Parenting: for parents of preteens and teens, evidence-based program provides parents with the skills needed to use effective discipline, teach responsibility, and communicate with their children. Each session (6 weeks total) shows parents how to handle sensitive issues such as drugs, sexuality, and violence.
- Bridging Digital Divides – A collaborative partnership with Boulder Valley School District and other area organizations to offer internet access, devices, and digital literacy classes to low-income families.
- Family Leadership Training Institute (FLT): A 20-week, nonpartisan training that brings diverse family leaders together to explore their own leadership goals, community issues, and those vital leadership and civic skills needed to create positive change in communities.

3. **Program measurements:** Provide the following information for the program/activities for which funding is requested:

- **Quantitative measures:** For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

SCCC is here to assist anyone who is struggling to meet their basic needs, without discrimination. As such, we don't have a "target" population other than residents within our geographical service area (Louisville, Lafayette, Superior, and Erie). However, we do work to ensure that marginalized individuals have equitable access to services. On average, 30% of our participants are children, 75% of the families we serve have children (ages 0-17) in the household. 57% self-identify as Hispanic/Latino and an additional 10% as BIPOC. 98% of the families we serve are Very Low-income (making 31-50% of Area Median Income) or Extremely Low Income (30% or less of AMI).

Quantitative evaluation is conducted monthly, quarterly and annually as a method of evaluating programming and changing needs in our community. In 2023, SCCC provided 968 City of Louisville residents within 378 households with the following services:

- 278 households received 439,351 pounds of food throughout the year
- 121 households received \$99,160 in household (rent/mortgage) assistance
- 63 households received \$56,827 in electric/gas utility assistance
- 14 households received \$6,470 in water utility assistance
- 50 households received \$10,899 in misc. financial assistance such as gas, property taxes, car repairs, phone bills, glasses, prescriptions, etc.)

- **Qualitative measures:** How will you measure the success of this program/activity?

SCCC uses Boulder County Connect (BCC) to track our participant data. Using the same database as other agencies in the region creates a streamlined experience for our participants and eases information sharing between agencies. BCC tracks participant activity by household, including life essentials received and progress moving along the continuum from crisis, to stable, to thriving.

We use the Colorado Family Support Assessment (CFSA2) as the primary tool for Family Resource Centers to assess family outcomes for those enrolled in our long-term Family Development Path. The CFSA2 utilizes the Five Protective Factors: parental resilience, social connections, concrete support in times of need, knowledge of parenting and child development and social and emotional competence of children. The tool is constructed to obtain objective and reliable information on family strengths, areas of need, and readiness to change. It also allows us to track individual families and their progress along the family development path. This information helps us gauge which services to emphasize, develop new programming, and identify new burgeoning issues in the community.

Annually, we conduct the FRC Self-Assessment Standards of Quality for Family Strengthening and Support to assess our family centered care services and analysis of service for optimal delivery--we meet all of these standards and rank excellent in several of the categories.

Additionally, we actively seek participant input and feedback through periodic surveys and focus groups of programs to evaluate participant satisfaction and needs. Our Participant Advisory Committee meets monthly to discuss ways to improve our policies and programming. We have Louisville residents and former participants on our staff and board.

4. **Evaluation:** If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

BCC reports that in our 2023 calendar year, we served 8,328 unique individuals among 3,168 households with the following services:

- 1,525 households received Advocacy services including 1,160 households who received \$1,195,317 in Direct Financial Assistance:
 - o 730 households received \$609,167 in rent or mortgage assistance
 - o 134 households received \$57,068 in utilities assistance (gas, electric, or water) directly from Sister Carmen, and an additional 493 were connected to \$440,264 through Energy Outreach Colorado funds
 - o 129 individuals received \$41,922 for vision exams and eyeglasses
 - o 184 households received \$36,019 for misc. support (taxes, phone bills, copays, dental exams, car repairs, etc.)

- o For more in-depth and long-term Family Support Services, 54 households participated in Family Development Path, 56 households enrolled in the Housing Stabilization Program, and 20 individuals enrolled in Pathways to Economic Stability
- 427 households received \$31,640 in free Thrift Store shopping vouchers
- We distributed 44 bikes, 180 individuals received bus tickets, and 213 received \$10,875 in gift cards for essential needs like gas cards or baby safety items
- 2,229 households benefitted from the Food Bank, which distributed a total of 1,277,071 pounds of food including 822 pounds from our own community garden.
- For health: 180 participants attend exercise classes, 84 individuals attended Nutrition & Cooking classes, and 81 attended meditation/wellness workshops
- Nurturing Parenting Program provided 61 parents with best practice parenting strategies
- 58 families participated in Circle of Parents, Active Parenting or Dare To Be You
- Bridging Digital Divides had 374 participants and provided 267 devices
- Family Leadership Training Institute's cohort had 15 participants and 6 graduates

Other Successes:

- We've been able to secure new funding to replace cuts in funding from longtime funders. This includes recently securing a new major, three-year grant from the Colorado Trust to provide more in-depth longer term housing support for families.
- Our Advocate team has been very stable, and able to keep waitlists short and respond to participants' needs quickly. Although we've had a couple position vacancies across the organization, including the Advocate Manager position, the rest of the Advocate team has done an amazing job stepping up to fill as needed until we get that position filled.
- We've continued to be a local leader in our Justice Equity Diversity Inclusion (JEDI) training, offering more education to staff than any other local organization—about 35 hours per year—through All Staff Meetings and an annual In-Service.
- We were a participated in the Community-Driven Policy pilot project with Community Resource Center, which was meant to further explore community-driven policy concepts in practice with community members and document learnings along the way. The report was published April of 2024.
- One of our community partners whom we work closely with to secure fresh food for families is Ollin Farms whom recently recognized SCCC when they co-presented a paper at the United Nations. The paper highlighted their case-study of land management based upon indigenous principles and discussing the benefits of engaging local families.
- We've had continued positive engagement with our Participant Advisory Committee, including co-planning Community Fun Nights, which have engaged over 330 unduplicated individuals. These and other projects as well as their ever important advice and feedback regarding our services, has been integral to how we operate as an organization.
- This isn't as specific to this grant, but SCCC's Community and Family Education classes continue to be popular and well attended. This includes parenting classes and support groups, Family Leadership Training Institute (FLTI), and Bridging Digital Divide (BDD), our digital literacy program. BDD has served 430 participants in our 23-24 fiscal year, and distributed 345 devices. Additionally, our Digital Equity Programs Coordinator, has been a leader in advocating for Digital Access in the state by hosting listening sessions in conjunction with the state's Digital Equity Plan, and has been honored by the Latino Chamber for her work.

We were a participated in the Community-Driven Policy pilot project with Community Resource Center, which was meant to further explore community-driven policy

Challenges:

- We've had turnover in a few key positions across the organization including the Advocate Manager, the Facilities and Operations Director, and our Thrift Store Director who is retiring this month.
- Lack of multi-year funding opportunities continues to be a consistent difficulty that puts stress on our future planning and administrative capacity. Most funders still adhere to a 1-year funding cycle, which causes a lot of work and leaves us never knowing what we can count on from year-to-year.
- It feels like there is a never-ending increase in need in our community. We don't have enough funding to meet all the requests for rent assistance, for instance. There are times of the year where we have fewer food options available to shoppers in the Food Bank.
- Unfortunately, we were not able to raise funds for an on-site playground that we really need and this project has been put on hold for the time being.
- Balancing the need to pay our staff well and offer robust benefits with the need to provide financial support to those in need in our community.

Based on the successes and challenges we've had over the last year, we don't anticipate any major changes in the way we provide services at this time.

5. Leadership:

- How many people serve on your Board of Directors and how many of these are Louisville residents?

Currently, SCCC has eleven Board members. At this time, one of our Board members, Dave Ireland, resides in Louisville.

- How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

SCCC employs 41 staff members, 30 of which are full-time, and five of which (12%) are Louisville residents.

- Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.

We have 350 regular volunteers who give a total of 25,000 hours of their time each year. The dollar value of volunteer time is generally valued at \$31.80 in Colorado from Points of Light. That's an equivalent of \$795,000 that volunteers have saved our organization over the last year. Our volunteers serve in our food bank, thrift store, onsite community garden, administrative offices, community events, classes, and assist with other special projects as needed. In addition to their served hours, many of our volunteers are dedicated financial and in-kind donors, and many are current or past program participants who wish to support other participants working toward self-reliance and economic stability.

Many community members also provide anonymous volunteer time organizing food and toiletry drives for the organization. We also host corporate and community volunteer groups for one-day events or special projects.

- Who will be responsible for the administration of the program or service?

Our organizational Key Staff include:

Suzanne Crawford - Chief Executive Officer

Suzanne has been the Chief Executive Officer of the Sister Carmen Community Center since January 2005 and has over 28 years in non-profit and management experience. Prior to SCCC, she worked for the American Red Cross in Disaster Services and as the Boulder/Broomfield Branch Manager for the American Red Cross Mile High Chapter. Originally, from Texas, Suzanne has lived in Colorado for 27 years. Although

she identifies as white, she grew up surrounded by Latine culture, speaks conversational Spanish and has traveled extensively. She particularly loves spending time with her Godson, Luis, in Ecuador. When not at work, she loves riding her motorcycle, paddle boarding, reading, and hiking with her dogs. She considers herself a lifelong student and is especially passionate about learning about JEDI (Justice, Equity, Diversity, and Inclusion) topics.

Katie Warning – Chief Program Officer

Katie has a Master's in Nonprofit Management and over 9 years' experience working for nonprofits. She joined SCCC in May 2017 as the Nutrition & Healthy Living Manager and moved into the Director of Programs position in July 2019. Prior to Sister Carmen, Katie worked for five years at a regional food bank in Kansas City, MO – serving a year as an AmeriCorps member and eventually holding a community engagement manager position to raise food and fund donations.

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

SCCC is an active member of Boulder County's [Family Resource Network](#). We work closely across governments (County and local), school district, and service providers/other area nonprofits (Clinica, Mental Health Partners, etc.) to address basic needs and social determinants of health. We have strong partnerships with Emergency Family Assistance Association, Broomfield FISH, and Outreach United Resource Center, which allows us to work together to address duplication of services and trending issues in the Boulder County and neighboring Broomfield County. In 2017, we created and signed an MOU to formalize the partnership between our agencies, and work together with Boulder County Housing and Human Services to implement a strong social safety net system. We coordinate referrals, engage in best practice trainings, and exchange program information.

We are a member of the Family Resource Center Association (FRCA). We collaborate to provide services and supports in the most effective way and work to improve access and coordination. SCCC leadership has held Chair and Vice Chair positions, as well as co-facilitates a monthly regional collaborative to respond to the needs of families quickly. SCCC has been an active member of the Human Service Alliance (HSA) for 18 years. HSA is a large group of human service nonprofits that meet regularly to formulate advocacy strategies on issues of interest including ballot initiatives and government funding priorities to address community needs and gaps.

The Boulder County Connect database is a countywide collaboration. SCCC is a forerunner in implementing the Strengths-Based Approach for case management, which has been adopted by Boulder County's Strategic Plan.

We work closely with area school within Boulder Valley School District and the St. Vrain Valley School District, especially to provide digital literacy classes.

SCCC also has co-located agencies to increase access and support to families in our service area. These include Safehouse Progressive Alliance for Nonviolence, Colorado Statewide Parent Coalition, Mental Health Partners (2 bilingual therapists are onsite to provide therapy), and St. Benedicts Health & Healing Ministry. In addition to this we have community partners offering outreach and support to participants for pet food (Colorado Pet Pantry), SNAP/Medicaid (Benefits in Action), GED/English Classes, etc.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

We are dedicated to a culture based on inclusiveness and equality, recognizing that diversity embodies all differences. We provide a welcoming environment for all and consider each stakeholder when undertaking programming, recruitment and development efforts. We are committed to having a diverse group of staff, board members, and volunteers with lived experiences of the community we serve. Half of our staff members identify as Latino or BIPOC and half are bi-lingual, including Spanish, Arabic, Farsi, and Thai. All participant information is provided in English /Spanish and translation services are available for all languages. In 2020, we conducted an agency-wide Equity Assessment, which led to us designating a staff member as our Equity Manager who works to improve our agency's policies and practices in regards to Justice, Equity, Diversity, and Inclusion (JEDI). Our staff receive at least 35 hours per year of JEDI training. We have seven staff members who serve as Cultural Ambassadors. Their role is to support and advance SCCC's short- and long-term JEDI Planning. We actively seek participant input and feedback through our Participant Advisory Committee, participant surveys, and individually.

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Restricted Income (grants and contracts)	\$2,008,500	48.7%
Donations Income	\$1,700,000	41.2%
Thrift Store	\$262,210	6.4%
Operating/Unrestricted Grants	\$150,000	3.6%
Fees/earned income: office leasing space	\$5,775	0.1%

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature

Signature

Suzanne Crawford

Agency Director

303-605-4342 x104

Telephone Number

suzanne@sistercarmen.org

E-Mail Address

Dan Mackin

Board President

720-299-0767

Telephone Number

dan@scccboard.org

E-Mail Address

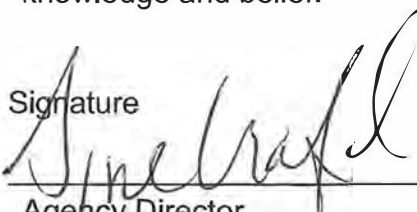
Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Restricted Income (grants and contracts)	2,008,500	48.7
Donations Income	1,700,000	41.2
Thrift Store	262,210	6.4
Operating/Unrestricted Grants	150,000	3.6
Fees/earned income: office leasing space	5,775	0.1

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature


 Agency Director
 303-665-4342 ex. 104

 Telephone Number

 suzanne@sistercarmen.org

 E-Mail Address

Signature


 Board President
 720-299-0767

 Telephone Number

 dan@scccboard.org

 E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.



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

SISTER CARMEN COMMUNITY CENTER INC
KRISTEN BOHANON
655 ASPEN RIDGE DR
LAFAYETTE, CO 80026

Date:

May 27, 2022

Employer ID number:

84-0820308

Form 990 required:

990, Yes

Person to contact:

Name: Ms. Morgan

ID number: 1000194954

Dear Madam:

We're responding to your request dated January 26, 2022, about your tax-exempt status.

We issued you a determination letter in February 1981, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax-deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period.

- Form 990, Return of Organization Exempt From Income Tax
- Form 990-EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Sister Carmen Board of Directors**2024**

	Office/Committee(s)	Occupation/Employer	Skill Set	Current Term Dates	Current Term
Dan Mackin Lafayette CO 80026	Board Chair Compliance	Cybersecurity Rule4	IT, info security	1/1/22 - 12/31/25	2
Mabel García-Parró Erie, CO 80516	Vice Chair, Treasurer Advancement	Consultant Scaled Agile Inc.	marketing, international business, FLTI program	1/1/21 - 12/31/24	1
Casey Wopat Lafayette, CO 80026	Advocacy	Cybersecurity Splunk	marketing, project management, info	1/1/23 - 12/31/26	1
Dave Ireland Louisville, CO 80027	Compliance Chair	Retired Information Technology	business processes, IT, info security	1/1/21 - 12/31/24	2
Komal Goyal Lafayette, CO 80026	Advocacy	Managing Partner 6e Technologies	technology	1/1/23 - 12/31/26	1
Russ Porter Lafayette, CO 80026	Advocacy Chair Compliance	Financial advisor Porter Insurance Agency	public speaking	1/1/23 - 12/31/26	2
Soledad Diaz Boulder, CO 80301	Advancement	Program Director SPAN	business, law, program administration	1/1/21 - 12/31/24	1
Kathy Rimar Erie, CO 80516	Advancement Advocacy	Retired Attorney	public speaking	1/1/24 - 12/31/27	1
Matt Stamski Boulder, CO 80305	Advocacy	Lawyer Faegre Drinker	law	1/1/24 - 12/31/27	1
Claudia Gilbert Boulder, CO 80303	Advocacy	N/A	educator	1/1/24 - 12/31/27	1
Shawn Ritter Westminster, CO 80021	Advocacy	Coldwell Banker Realty	management	1/1/24 - 12/31/27	1

Board Demographic Composition: 7 female, 4 male, 4 identify as BIPOC/Latino, 4 bilingual, 1 current/former participants, 1 LGBTQ, 0 disability

SISTER CARMEN COMMUNITY CENTER, INC.

Financial Statements As Of June 30, 2023
(With Summarized Financial Information for
The Year Ended June 30, 2022)

Together With Independent Auditors' Report



INDEPENDENT AUDITORS' REPORT

To the Board of Directors of
Sister Carmen Community Center, Inc.:

Opinion

We have audited the accompanying financial statements of Sister Carment Community Center, Inc. (the "Center"), which comprise the statement of financial position as of June 30, 2023, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Sister Carment Community Center, Inc. as of June 30, 2023, and the changes in net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Center and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Center's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Independent Auditors' Report (Continued)

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Center's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Center's ability to continue as a going concern for a reasonable period of time.

We are required to communicate to those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Independent Auditors' Report (Continued)

Reporting on Summarized Comparative Information

We have previously audited the Center's 2022 financial statements, and our report dated December 16, 2022, expressed an unmodified opinion on those audited financial statements. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2022, is consistent, in all material respects, with the audited financial statements from which it has been derived.

JDS Professional Group

December 7, 2023



Family Resource Center Association
Connecting Resources, Impacting Lives

Sister Carmen
COMMUNITY CENTER
A Family Resource Center



Annual Report
2022 - 2023
52/251

From Our Chair

Dear Friends of Sister Carmen,

In talking with family, friends, and colleagues over the past year, it feels like we're living in a peculiar and curious time. On the one hand, everything seems wonderful — better than it ever has been! On the other, many of us feel like the world is falling apart, and it's easy to believe that there isn't much we can do about it.



During these times, we must remember that even small actions can make a significant difference and that it is our responsibility to take those actions. Whether it's choosing to donate to impactful local nonprofits (like Sister Carmen!), volunteering our time, or showing kindness and empathy to others, we have the power to make a difference. It's not about grand gestures but about consistently doing good — no matter how small the act may seem.

This past year, I've been uplifted by the number of conversations I've had with folks in the community asking if they, or their kids, can get involved and volunteer at Sister Carmen Community Center. It is especially inspiring to see the importance of volunteerism being instilled within the youth in our community. Volunteering is an incredibly rewarding experience as it connects you to others, the direct impact of your efforts is clearly visible, and, at the end of the day, you know you're making a difference.

As you review this year's Annual Report, I encourage you to consider becoming more involved with Sister Carmen Community Center. We invite you to visit the Center, learn about different ways you can get involved in the incredible work being done, and hear the stories of the people whose lives have been positively impacted by your generosity... and when you're ready to become a volunteer, reach out to volunteering@sistercarmen.org. I promise you won't regret it!

Lastly, I want to highlight Sister Carmen's inspiring strength-based approach to providing services. As you'll see in the Annual Report, the staff at Sister Carmen work incredibly hard to prioritize participant and community voices and work alongside individuals to meet them where they are. Our dedicated leadership, staff, and volunteers have tirelessly supported our neighbors, ensuring they receive the assistance they need with dignity and respect.

Thank you all for your continued support. Your contributions have an amazing impact and absolutely make a difference, and for that, we are deeply grateful.

A handwritten signature in black ink, appearing to read 'Dan Mackin'.

Dan Mackin
Chair, Board of Directors

BOARD OF DIRECTORS

Dan Mackin, Chair
Mabel Garcipara,
Vice Chair/Treasurer
Joe DiRago, Secretary

Larissa Caparachini
Soledad Diaz
Komal Goyal
Sara Johnston

Dave Ireland
Jacque Molenaar
Russ Porter
Casey Wopat

Our Mission

Sister Carmen Community Center provides assistance to the residents of Lafayette, Louisville, Superior, and Erie who are in need, without discrimination.

In fiscal year 2022-2023, we served:



7,898
individuals



55.99% female



43.57% male



< 1% transgender,
gender non-conforming or
unknown 0.57%

Individuals Served by Location:



29%
children



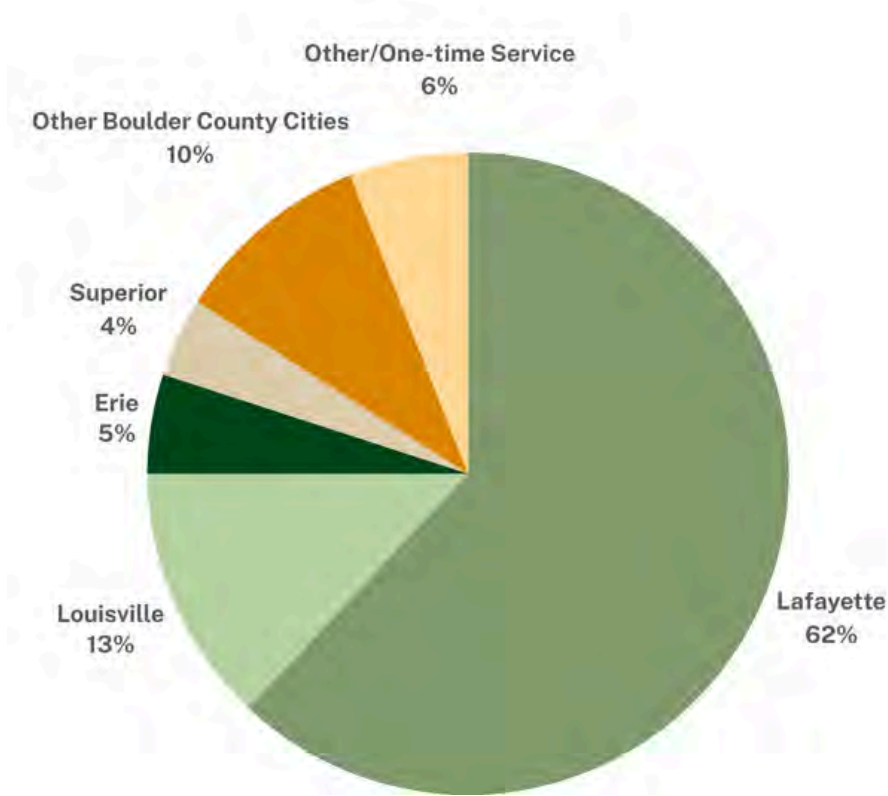
18% (55+)
seniors



3%
have a disability



26%
do not have
health insurance



The Vision: A More Welcoming Food Bank

In 2022, our Participant Advisory Committee (PAC) had an idea to improve the experience of shopping in our food bank — add a vibrant mural to the space! Thanks to PAC’s idea, grant funds from the Colorado Blueprint to End Hunger, and the talent of local artist Mario Miguel Ecchevarria, a new mural was installed on the walls of our food bank in the summer of 2022.

Ecchevarria’s piece, named “Sembrando Vida” or “Sowing Life” by PAC, brought the committee’s desired themes for the project — nourishing food, culture, and community — together in perfect harmony. The mural succeeded in elevating the space and shopping experience at our food bank. It uplifts the moods of all who see it — participants, volunteers, and staff.

Photos of the mural, PAC members, and their families appear throughout this report. For more information about the project, please see the Artist’s Narrative at the end of this report.





ADVOCACY

We provide families with one-on-one, individualized, and culturally responsive support to meet immediate needs, as well as short- and long-term goals towards self-reliance. Through all our Advocacy services, we use a family-centered, family-led approach that focuses on their strengths.

We support participants in advocating for themselves and their families to attain stability by providing information, resource/referral connection, and personal guidance that is unique to each family's situation. We prevent homelessness and improve stable housing by providing direct rent/mortgage, utility, and other necessary financial assistance, as well as by encouraging and providing connection to resources such as financial planning, parenting support, enrolling in healthcare/public benefits, employment, legal guidance, and more.

Through several Advocacy programs, we also provide ongoing Family Support Services that help strengthen families, increase family economic self-reliance, and improve family health long-term. This includes building rapport and trust, family-driven goal setting, coordinating services, considering strengths and needs of the families based on the Colorado Family Support Assessment 2.0, and regular follow-ups. These include:

Family Development Pathway: Families in need of multiple months of assistance and other areas of support are invited to meet with an SCCC Advocate on an ongoing basis. **In fiscal year 2022-2023, 71 households participated in this program.** Despite a challenging year, a total of 131 goals were set, 60 were accomplished, and 62 are ongoing.

Housing Stabilization Program: This Boulder County program provides short-term rental/deposit assistance (up to 12 months). Families partner with an SCCC Advocate to connect with resources, improve money management skills, and build employment skills. **In fiscal year 2022-2023, SCCC helped 34 households through this program.**

Pathways to Economic Stability: An SCCC Advocate guides participants toward improved economic stability and self-reliance by connecting participants with — and supporting them through — pre-set career tracks in high-demand fields that will guarantee employment and a livable wage upon graduation.

Direct Financial Assistance

In our 2022-2023 fiscal year, we served **7,898 individuals** within **3,023 households**. Of those, **1,574 households** received Advocacy services, including **1,130 households** that received **\$1,226,634** in Direct Financial Assistance.



664 households received **\$698,238** in rent or mortgage assistance



536 households received **\$412,038** in utilities assistance (electricity,* gas,* water) *mostly funded through Energy Outreach Colorado



126 individuals received **\$45,942** for vision exams and eyeglasses



235 households received **\$70,416** for miscellaneous support (taxes, phone bills, copays, car repairs)



370 households received **\$28,395** in free thrift store shopping vouchers



35 individuals received refurbished bikes;
173 households received bus tickets, and **279** received **\$16,410** in gas cards

58/251



NUTRITION & HEALTHY LIVING

An important aspect of regaining stability is consistent access to nutritious food, necessary medical care, and mental health counseling. Sister Carmen provides supportive services that can stop the downward spiral of a crisis situation so that families are not faced with the decision of whether to buy food, pay rent, or attend to their health.

Food Assistance: Our food bank is open five days a week, and families can visit three times a month. We see an average of 250 visits a week. Participants may shop in-person, pick up a food box via drive-through, or have food delivered if they have barriers to transportation. They receive a variety of nutritious food including proteins, fresh fruits and vegetables, dairy, and grains. We offer alternatives for those with dietary/religious restrictions. Baby formula, diapers, pet food, hygiene items, and more are also available.

Our food bank is culturally responsive, offering foods from a variety of cultures so families can choose foods that are familiar and important to them.

Healthy Living: We offer free Cooking and Nutrition classes, exercise classes, free repaired bicycles, and fresh produce from our Community Garden, which is open to the public.

Healthcare Referrals: We collaborate with St. Benedict Health and Healing Ministry, Good Samaritan Hospital, Dental Aid, and Clinica Family Health to quickly and easily refer participants to necessary healthcare. We cover the cost of eye exams/glasses. Two part-time bilingual Mental Health Partners therapists work exclusively on-site with SCCC participants.

In fiscal year 2022-2023, our Food Bank served:



**2,086
households**



**1.26 million lbs
of food**



**1,100 lbs of
produce from
our garden**

COMMUNITY & FAMILY EDUCATION

In order to empower families, we provide skills and resources they need to make positive changes both at home and in the community. We offer in-person childcare programs that run concurrent with the adult classes. All courses are free, available in English and Spanish, and meals are provided.

Nurturing Parenting Program

This 12-week evidence-based course for parents of children aged 0-5 is family-centered, trauma-informed and designed to empower individuals with parenting knowledge, beliefs, strategies and skills proven to reduce childhood abuse and neglect.



Active Parenting Program

This evidence-based course for parents of teens and ‘tweens gives parents the guidance, support, and skills they need to turn the modern-day challenges of raising a teenager into opportunities for growth.

Circle of Parents

Support groups for parents/caregivers impacted by alcohol or substance abuse

Bridging Digital Divides

This 8-week digital literacy course ensures low-income families have internet access, a device, and the basic computer skills to use it. Lessons include how to use email, Google platforms, navigate school websites, and tips on how to access commonly needed resources such as government assistance programs and healthcare websites.

Community Fun Nights

SCCC hosts free quarterly community events to facilitate positive and culturally appropriate family and community engagement.

Family Leadership Training Institute (FLTI)

A 20-week, nonpartisan training that brings diverse family leaders together to explore their own leadership goals, community issues, and those vital leadership and civic skills needed to create positive change in their communities.

Professional Development Training

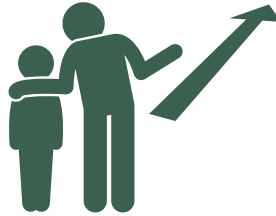
We are a local leader in offering a wide range of nationally recognized human services trainings: Family Development Credential, Bridges Out of Poverty, Protective Factors, Standards of Quality, Nurturing Parenting for Professionals, Strength-Based Practice, and Integrated Service Delivery Model of Care.

Community & Family Education Highlights

In fiscal year 2022-2023, many SCCC participants were enriched by our Community & Family programs:



47 parents participated in **Nurturing Parenting Program**



20 parents participated in **Active Parenting classes**



30 participants regularly attended **Circle of Parents** support groups



8 parents participated in **Dare To Be You**, a pilot class through partnership with Boulder County Health Youth Alliance that aims to reduce drug and alcohol use through a prevention program that strengthens intermediate resiliency factors in 2 to 5 year-old youth and their families



6 individuals graduated from the **Family Leadership Training Institute**



300+ individuals attended 4 culturally and family-friendly **Community Fun Nights**



390 individuals were empowered with basic computer literacy skills, and **283 received free devices** through our **Bridging Digital Divides** program

Volunteer of the Year: Eloy Vazquez

Eloy Vazquez first learned of Sister Carmen Community Center after his family lost their home in Superior to the Marshall Fire in December of 2021.

“At first, I was very ashamed to get any help. My wife finally talked me into it. By that point, it had been several months since the fire and most nonprofits were done offering fire support, but you guys were still helping.”

When Eloy finally did come to Sister Carmen, he says, “Everyone was extremely understanding and welcoming. Katie, from the thrift store, was one of the crucial players who made me feel comfortable about getting help. After we accepted support, I decided that we should give back. At that time, the easiest way to give back was to volunteer. So we did. And then I got to know some of the people here, and they were super kind, really nice, cool people.”



Eloy’s family resettled in Lafayette, and he has been a fixture at Sister Carmen ever since. For a time, the whole family — Eloy, his wife, Laney, and their son, Emory — all volunteered. Eloy and Emory worked with a group of students from Emory’s high school, Peak to Peak, at the thrift store. They also helped with our Bridging Digital Divides computer literacy program.

The apple didn’t fall far from the tree as it turns out. Time spent volunteering at SCCC soon inspired Emory to create a nonprofit of his own. He founded a student-led

nonprofit called Connect Digital Inclusion Labs that provides technology assistance sessions around Boulder and Weld counties at libraries and assisted-living facilities, etc.

Retired from a career in international logistics — moving cargo, like large shipments of wind turbines for wind farms — Eloy continues to volunteer at Sister Carmen and is happy to give back whenever and wherever he’s needed. Beyond the thrift store, he helps in the food bank and garden. He’s also the first to volunteer to set up for events and to take on special projects at SCCC.

He came to give back, but he stays because of the people — other volunteers, staff, and participants. Originally from Mexico City, Eloy moved around a lot for jobs before settling in Colorado. “Getting to know everybody at Sister Carmen has been like finding extended family,” he says. “There’s a great sense of community here.”

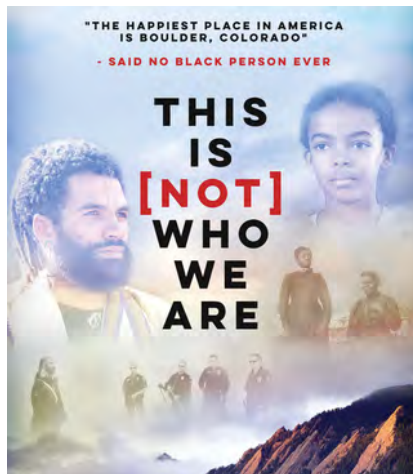
Our JEDI Journey

The quest for Justice, Equity, Diversity & Inclusion at Sister Carmen

Sister Carmen Community Center's Justice, Equity, Diversity, and Inclusion (JEDI) journey began in 2004 when we recognized the need for equitable policies in our Thrift Store and Food Bank. We soon started diversity activities and trainings to educate staff and foster inclusiveness. Over the years, our efforts have grown to ensure representatives of diverse communities have a voice in our programming through our Participant Advisory Committee (PAC), staff and leadership teams, and board.

Justice, Equity, Diversity, and Inclusion Commitment Statement:

To ensure that Sister Carmen Community Center is an inclusive organization, dedicated to developing practices, policies, and procedures, which advance justice, the following is our plan to advance EDI:



- Pursue deliberate efforts to ensure that SCCC is a place where differences are welcomed, perspectives affirmed, and a sense of belonging is fostered.
- Offer continuous EDI professional development opportunities, both formal and informal.
- Share tools and resources with our staff, board, and volunteers.
- Continue to recruit and retain a diverse workforce, both staff and volunteer.
- Recognize, address, and eradicate all forms of organizational inequities.
- Continue to develop and enact equitable policies, practices, and procedures. Document existing policies.
- Integrate EDI throughout the organizational culture and day-to-day operations.

- Continually assess and evaluate our EDI efforts.
- Leverage our partnerships, relationships, and resources to promote equity and justice.

Staff Development and Training:

- Monthly JEDI trainings facilitated by our bilingual, bicultural Equity Manager, cover topics like microaggressions, allyship, harassment response, environmental racism, immigration, LGBTQ concerns, and more.
- Training sessions in fiscal year 2022-2023 included Intercambio Uniting Communities, Regan Byrd Consulting, and Zayd Atkinson from the documentary ***"This Is [Not] Who We Are"*** (pictured above).
- Implicit bias testing is required for all employees.
- Diverse hiring practices, such as removing degree requirements for certain positions
- Additional pay for bilingual staff, flexible paid family leave, and floating holidays
- Employing Dreamers and hiring bilingual, bicultural HR and Equity Managers
- Adding JEDI requirements to all job descriptions

Community Engagement and Representation:

- Participants have been on our board since 2005.
- Our PAC, started in 2012, meets monthly and advises on food bank operations, culturally appropriate foods, community outreach events, and more.
- Leadership opportunities include positions like Equity Manager, Bilingual Advocate Supervisor, and Cultural Ambassador.
- Seven Cultural Ambassadors on staff act as bridges between their communities and our organization.
- Annual participant surveys gather feedback.
- Preference for hiring local contractors and vendors owned/operated by BIPOC community members or underrepresented groups.



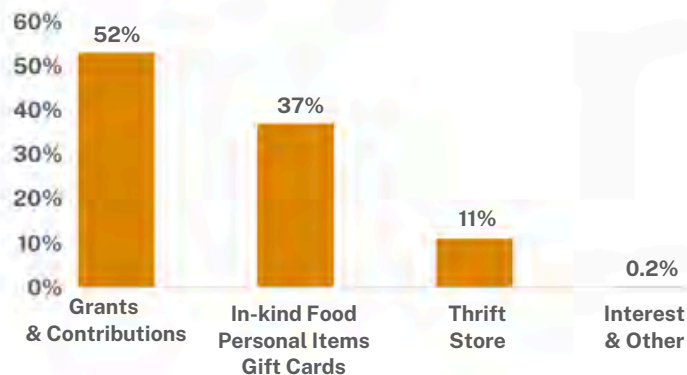
SCCC staff created a Día de los Muertos (Day of the Dead) altar at the Lafayette Public Library.

Reducing Barriers to Access:

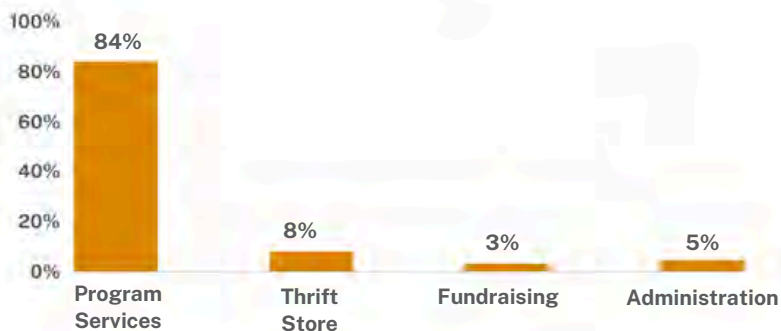
- Comprehensive translation services ensure language is not a barrier. All participant information and programs are in English and Spanish, with materials available in multiple languages.
- Over 50% of our staff are fluent in Spanish, and others speak Thai, Arabic, and Farsi.
- Bus tickets, gas cards, and childcare services are provided during in-person activities.
- Meals are offered during in-person activities to ensure attendees do not have to choose between participation and basic needs.
- Our food bank uses a self-choice grocery shopping model, and our advocacy services are participant-led using a strengths-based approach.
- Programming is offered in the community when possible, such as Bridging Digital Divides (BDD) in neighborhood schools.
- Digital skills training through BDD ensures participants have equitable access to services.
- Our Family Leadership Training Institute (FLTI), a 20-week, nonpartisan training course, brings diverse family leaders together to explore community issues and goals, and the vital leadership and civic skills needed to create positive change in their communities.

Financials

INCOME



EXPENSES



INCOME

Grants & Contributions:	\$3,688,385
In-kind Food, Personal Items, Gift Cards:	2,620,178
Thrift Store:	749,815
Interest & Other:	11,380

TOTAL **\$7,069,758**

EXPENSES

Program Services:	\$6,519,414
Thrift Store:	628,207
Fundraising:	254,825
Administration:	362,430

\$7,764,876

Financial Note: Additionally, we carried over an income surplus of \$600,000 from the previous fiscal year. Between that and contracts that we received payment for services after the end of the fiscal year, we did not actually operate at a loss in 2023 despite having less total income than expense.

Thank You to our FY 2022-2023 Supporters!

Thank you to the following generous donors, each of whom contributed \$1,000 or more during Sister Carmen Community Center's 2022-2023 fiscal year! Every donation of food, thrift store goods, or funds—no matter the size—is important and helps us to fulfill our mission! We limit our Annual Report to listing only \$1,000+ donors by name, because it can be difficult to list every single donor when there are so many. We still love and appreciate you all!

CORPORATE PARTNERS

Agile Leadership Journey
Comcast Corporation
Frontier Metal Stamping, Inc.
Intermountain Healthcare
Porter Insurance Agency
RSF Social Finance
Rule4
Scaled Agile, Inc.
Waste Connections of Colorado

GOVERNMENT

Boulder County
City of Boulder
City of Lafayette
City of Louisville
State of Colorado
Town of Erie
Town of Superior

COMPANIES

Bank of America Charitable Gift Fund
Bigelow Investments, LP
Eastpark Associates, LLC
FirstBank
Google
Innovative Openings, Inc.
Klose Training
Medtronic
Mile High Tubulars
Mon-Sai Jewelry

NALC Branch #642
Point West Properties
Redis Inc.
Thermal Energy System Specialists
Unlimited Property Improvements
Western Digital

FOUNDATIONS

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Atomic Investors
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Guys Who Give
Lafayette Aging Foundation, Inc.
Lafayette Lions Club
Mile High United Way
Mount Calvary Legacy 125
Endowment Fund
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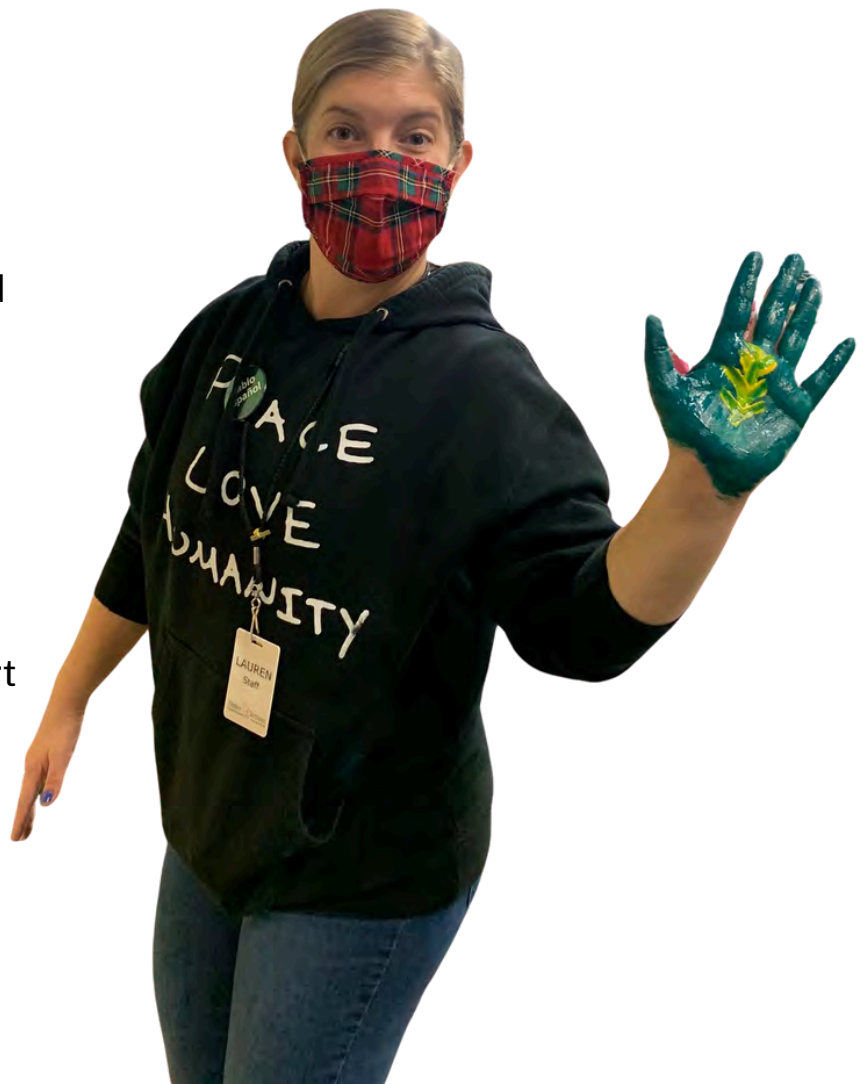
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*Every effort is made to recognize our donors correctly and in accordance with their anonymity preferences.
If your name is listed incorrectly, please call 303-665-4342.*



Bringing the Vision to Life: The Artist's Project Narrative

When someone walks into the Sister Carmen Food Bank, chances are the very first thing they will experience is a smiling, welcoming Sister Carmen staff member or volunteer. Next, they will undoubtedly notice the incredible bounty that was sourced and arranged in the store by these same staff members and volunteers. Then, if they look to the walls behind all this goodness, they will hopefully see a giant rainbow rising in a bright arc over the shelves and surplus of food below.

Hello, I am Mario Miguel Echevarria, and I painted the rainbow and the mural on the walls of the Sister Carmen Food Bank. Like most humans on earth, I

fell in love with the beauty of rainbows at a young age. But I did not paint this rainbow simply for a splash of color in the mural. The rainbow plays a key narrative role in the mural. Rainbows are symbolic of many things for people. For many of us, they are emblems that symbolize joy, good fortune, bounty and happiness. The variety of colors in a rainbow can also serve as a visual display of our exquisite human diversity and the welcoming nature of inclusivity. All these connotations most definitely apply to the Sister Carmen rainbow! However, the primary reason I included a rainbow was to honor the presence of the individual at Sister Carmen.

When someone enters the main entryway to the food store and looks towards the center of the food aisles, they might notice that the rainbow is perpendicular to where they are standing. I did this to welcome all individuals that enter the store, and whom will most likely be looking into the heart of the store to plan their next move. By doing this, my hope is that the positioning of the rainbow will imply that the rainbow materialized in the space because the visitor entered the space. After all, the science of rainbow formation dictates that it is the sun and the angle of the sun's energy moving through the water droplets that allows for the rainbow to exist. For me, this was

an intriguing method to subtly transform the space from a neutral environment into an environment that feels like a physical extension of the individual that has entered the space. I wanted to communicate to the visitor that Sister Carmen was built for and operates

exclusively to support the visiting individual's needs. In other words, Sister Carmen, aka the rainbow, is here because you are here and the hope is that your life will be a

little bit better as a result of your interaction with Sister Carmen.

Let's walk a little closer towards the rainbow to see what the mural has to offer: The bounty of food tumbling out of the end of the rainbow takes the place of the fairy tale "pot of gold at the end of the rainbow." Where the

colors of the rainbow meet the earth, food of the same color appears for the taking: yellow squash, blueberries, green apples and so on. The rainbow was a part of my mural design from the very beginning, but the rest of the original mural design was very



different from the final result we have now. Originally, I had lots of small and creative moments throughout the space. For example, I had a moment where a pyramid-shaped tower of crackers with olives and grapes in the tower recesses was being lowered onto the top of an actual Sister Carmen doorway by crane. Then

late one evening, when I was close to finishing one key area from my original design, I decided to stop for a break. The wall I was working on had featured a young boy sitting on top of bundles of wheat playing a flute for a bunch of chickens laying eggs.

While studying the wall, I suddenly realized that all the "small intimate moments" I had planned, such as this one, would be lost in the busy visual and physical activity of the store.

I sat on my scaffolding and pondered. I shut my eyes and a new plan appeared in my mind's eye. In this new approach, three large "grand gestures" would take the place of the many small gestures. I saw three giant figures, all women, forming a group of narrative "sisters" that would be the bold storytellers in the mural.

On the left wall, as you are facing the rainbow, you will find the head and shoulders of a woman confronting challenges in her life that are not necessarily food oriented. She appears immersed in dark and stormy skies. However, rather than being burdened and compromised by the deluge, she is able to experience the storm on positive terms, indicating that she is in control of how she internalizes the environment she finds herself in. The fact that she is in control of her state of being is symbolized by what she, and vicariously we, see as she gazes at the heavy storm: a beautiful, welcome shower of flowers tumbles from the clouds rather than a torrential rain. She is, in effect, focusing her energy on living a meaningful and productive life rather than just surviving. This wall is an expression that Sister Carmen is here to support her, and us, when needed. Did you know that Sister



Carmen offers assistance for more than just putting food on the table? They also offer psychological support through carefully implemented programs, advocacy and services. By the way, because this is a food bank, it seemed important to paint only flowers that are actually edible (nasturtiums).

Moving to the right from the "shower of flowers" wall, you might notice the previously mentioned tail end of the rainbow, where food appears to be in

motion as it tumbles to earth. To the right of the colorful bounty of fruits and veggies, there lies a giant, majestic, grapefruit arch over an entryway used by employees. I love grapefruits, they are so generous with what they have offer. The pulp, the juices, the seeds and all, so good for us! I painted this to honor all the Sister Carmen employees and volunteers and the invaluable role they play at Sister Carmen. Moreover, wild scale changes, like a giant citrus, are surprising

and fun to experience. The same holds true for all of the Sister Carmen personnel. The people at Sister Carmen are so much fun!

The second key figure in the mural I added serves as the embodiment of the Sister Carmen mission. She is from the land. She is humble and appears without judgement, her eyes lowered in reverence and out of respect for the Sister Carmen participant. She offers a bundle of wheat to us, the visitors. I wanted her to feel as though she is, quite literally, stepping out of the mural and into the



store to present us with an offering, the fruit of her labors. The beautiful stalks of wheat in her outstretched hands are being offered to the visitor like a bouquet of flowers. For me, this gesture continues the "edible shower of flowers" narrative. The bundle being offered is more than food, it is vitality being offered so that the Sister Carmen participant can live their life without stressing about their basic needs. Humility, respect, and the giving spirit. This figure embodies these incredibly valuable qualities.

The third and final figure represents passionate responsibility and skilled stewardship. This figure is confident, knowledgeable,

aware, and deliberate in her actions. She examines the health of the corn and applies her wisdom to the careful cultivation of living things.

Indigenous peoples of North America had developed effective food growing systems long before the Europeans came to the continent. The Iroquois and Cherokee labeled the combination of corn, beans and squash "the Three Sisters" because they each nurture



each other, like a family does, when they are planted together. The Native Americans planted corn and beans on small hills and they planted squash between the hills. Beans contribute nitrogen to the soil, which fertilizes the corn and the squash. The corn stalks provide a structure for the beans to climb on and the broad squash leaves cover the ground to prevent weeds from growing and simultaneously preserve the moisture in the soil. The three sister crops grow and thrive significantly better than if they were planted alone.

The same holds true for the "three sisters" in the Sister Carmen mural! Sister

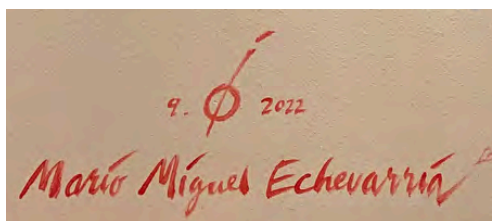


Finishing touches: Once Mario completed the mural, members of our Participant Advisory Committee and their families added their hand prints to the project.

Carmen is powerfully effective because it combines skilled efforts and intentions to address the needs of the whole individual. Sister Carmen is so much more than a food bank!

Dignity of the individual happens when humans are able to focus their energies on living rather than just survival.

Thank you, Sister Carmen!



To learn more about this project and the artist, please see this [Daily Camera article](#).





GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization TRU Community Care

Program Title or "General Operating" General Operating

Contact Person Carey Kerschner Title Foundation & Donor Relations Manager

Address 2594 Trailridge East. Lafayette, Co 80026 Telephone: 720-698-3057

E-Mail careykerschner@trucare.org

Program Duration (if applicable) Begin 01/01/2025 End 12/31/2026

Anti-Discrimination Policy (Required) ☐ Yes ☒ No ☐ Other _____

2025 2026

Grant Amount Requested for **2025 and/or 2026** \$ 3,000.00 \$ 3,000.00

CITY OF LOUISVILLE, COLORADO

GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. **Organizational background:** What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

In 1976, Boulder County Hospice became the first hospice in Colorado. Through multiple name changes reflecting the growth of the organization and growing service area, TRU Community Care (TRU) is now approaching its 50th year providing critical care to our communities. What began as a small hospice, serving 15 patients in its first year, has evolved into an innovative nonprofit serving nearly 1,300 patients a day. TRU's mission, affirming life at every step of your journey with illness and loss, informs our daily work. TRU is leading a healthcare transformation by engaging with our communities and offering innovative, meaningful care for those living with chronic or terminal illness and loss. With offices in Lafayette, Louisville and Denver, TRU continues to offer the most comprehensive hospice care available. We now offer Palliative Care, a complete PACE (Program of All-Inclusive Care for the Elderly) Center, a Memory Care complex, a cutting-edge Telehealth Center located in Louisville, extensive Grief Services, and for our most critical patients, an In-Patient Care Unit (IPU) housed at the Longmont United Hospital. We employ 384 people, and we have 366 active volunteers. Our services are rapidly expanding in order to keep pace with the demand to care for our rapidly expanding aging population. According to the World Health Organization, "Between 2015 and 2050, the proportion of the world's population over 60 years [of age] will nearly double from 12% to 22%." This is a worldwide concern, and TRU has seen its patient numbers increase year over year. As a nonprofit that turns no one away based on an inability to pay, we also provide services to patients who do not qualify for Medicare, including unhoused and/or uninsured/underinsured patients.

2. **Program description:** What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

TRU provides medical, emotional, spiritual care, and grief support through compassionate care and pain management. This application seeks funding to support General Operating funds in support of uncompensated care provided to City of Louisville residents across three platforms: TRU Hospice Care, Palliative Care and Grief Services.

Hospice Care: As a patient's focus shifts from a cure to quality of life, TRU's goal is to help ease our patient's burdens enabling people to live every day that remains as fully and meaningfully as possible. TRU Hospice provides compassionate care and expert symptom management in the comfort of one's home, surrounded by loved ones. Our family-centered approach means we'll also guide and support family members/caregivers, along with offering grief support after the loss.

Palliative Care: The TRU Palliative Care program was started as a way of providing care to individuals with chronic medical problems who are seeking curative measures. TRU partners with patients, their family/caregivers, and primary care doctors and specialists to provide them with the care they need. TRU's board-certified physicians and nurse practitioners are uniquely qualified to address the needs and increase the comfort of people living with advanced illness. TRU provides the care necessary, in the location where each patient chooses to reside. Our Palliative Care Teams also work closely with community partnerships and social services ensuring that the patient/family/caregiver gets the support they need when they need it.

Grief Services: Family and friends of patients served by TRU Hospice are offered complimentary

counseling sessions after the death of their loved one. TRU offers several different grief support groups to meet the unique ways that people grieve. Each group is open to the community free of charge, not limited to only patients served by TRU. TRU has several different options tailored to meet different needs, such as group offerings for teens or youth of different ages.

As a nonprofit organization that turns no one away, all services are provided to our indigent population. Each of TRU's care teams include hospice/palliative-trained physicians, nurses, chaplains, certified nursing assistants, social workers, and specially trained volunteers who collaborate and work closely with the patient and family to provide support tailored to the patient's needs and wishes. In 2023 TRU provided care to 3,711 patients seeking end-of-life treatment. Hospice care takes place wherever a patient calls home: a private residence, an assisted living facility, a skilled nursing center, a homeless shelter, or at TRU's IPU. Referrals come to us from hospitals as many unhoused individuals use the emergency room for their primary care. The goal of supporting this demographic is to provide the medical care and comfort necessary, preventing critical or costly emergency room visits.

3. **Program measurements:** Provide the following information for the program/activities for which funding is requested:

Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

Based on the first six months of 2024, we on track to spend ~\$2,576,692.00 in uncompensated care, agency-wide in 2025. This same data anticipates 4.86% of care provided to 246 City of Louisville residents. From this we can estimate that \$125,227 will be accrued in uncompensated care within Louisville's city limits in 2025. In addition, our PACE Center consists exclusively of participants above the age of 55 and on Medicaid. Demonstrating financial need is a requirement to enroll in this program. We currently have 9 PACE participants that live in the City of Louisville. As the state's first nonprofit hospice and the only nonprofit hospice in Boulder County, we recognize the growth of for-profit, venture capital healthcare entities who are solely focused on margins. They don't serve all patient populations, because there is not sufficient reimbursement for services unless a patient has private pay. Each year we continue to see the number of patients turned away from other companies while our indigent patient population grows. Additionally, our Grief Services department has seen significant growth due to the higher utilization of our community grief support for people who are seeking tools yet don't have the resources to pay for private counseling. With unexpected catastrophic events such as both the Marshall Fire and the King Soopers shooting, both in 2021, it was a great benefit for our community that our Grief Service department was available to provide mental health services for our grieving community members from all areas in Boulder County.

Qualitative measures: How will you measure the success of this program/activity?

Using our Matrixcare software database, TRU collects extensive data on patients served. Some of the data we track includes: number of patients, where they reside, where they received treatment, number of days on service, and cost of care. We also track all volunteer activities by location and services provided.

4. **Evaluation:** If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

TRU Community Care embraces a culture of high reliability and impeccable customer service for our patients, supporting ongoing quality improvement and operational excellence through appropriate

education, training, and utilization of tools and best practices. The Medicare Hospice Benefit, established in 1983, provides beneficiaries with access to high-quality end-of-life care. Considered the model for quality care for people facing a life-limiting illness, TRU follows a patient-centered, cost-effective philosophy of care that utilizes an interdisciplinary team of professionals to provide compassionate and expert medical care, pain management, and emotional and spiritual support expressly tailored to the patient's needs and wishes. Medicare audits hospice programs regularly, seeking assurance that programs deliver services with integrity and competency. TRU uses widely accepted best practices to measure and ensure the highest quality of care for all our hospice and palliative care patients. We use a Quality Assurance & Performance Improvement (QAPI) program which is critical to improving care and services provided to our patients and families. Qualitative and quantitative data is collected primarily through the Hospice Item Set (HIS) and the Consumer Assessment of Healthcare Providers and Systems (CAHPS) Hospice Survey. This hospice survey was designed to measure and assess the experiences of patients who died while receiving hospice care, as well as the experiences of their caregivers. TRU takes a systematic, comprehensive and data-driven approach to maintain and improve safety and quality by continuously analyzing our performance and developing ways to enhance our services. In addition, TRU captures data on the number of admissions to each individual program, where patients live and where they may be receiving care, and the number of participants utilizing grief services. TRU adheres strictly to the monitoring and compliance across all our platforms. TRU is continually guided by best practices and evaluation surveys and reports received regarding our services.

5. **Leadership:**

- How many people serve on your Board of Directors and how many of these are Louisville residents?

TRU's Board of Directors is comprised of 17 members, one of whom, Kyle Brown, Colorado State Representative, is a Louisville resident.

Disclosure Pursuant to Louisville Municipal Code 2.24.050: While not a Louisville resident, David J. Thrower currently serves as the Co-Chair of the TRU Community Care Board of Directors and is also appointed as the Presiding Judge of the City of Louisville. Other than reviewing this disclosure, he will not participate in the grant process, has no authority to solicit or approve grants, and is not compensated by TRU Community Care.

- How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

TRU employees 290 full-time employees and 87 part-time employees. Nine Staff members live in the City of Louisville.

- Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.

Volunteers are an essential part of TRU Community Care. It is evident from the responses of patients, families and staff that volunteers are an important part of the hospice team of caregivers. They are also an integral part of the hospice administrative operation. TRU volunteers come from all walks of life. They are of all ages, educational and ethnic backgrounds. They bring their unique skills and life experiences to their volunteer commitment. According to our 2023 Year-End Stat Report, we provided 30,881 Total Volunteer Hours (which includes Hospice Patient Care Hours, Clinical Support Hours, Palliative Care Hours, and volunteers working at the Thrift Shop) through 366 active volunteers. The value of this volunteer time is estimated to be \$973,066. Twelve of our dedicated volunteers are Louisville residents.

- Who will be responsible for the administration of the program or service?

Our clinical team is led by our Director of Clinical Services, Director of Access and Director of Quality and Compliance and overseen by our Chief Operating Officer. The teams of caregivers include physicians, nurses, certified nurse assistants, social workers and chaplains. Each patient is assigned a team of practitioners who manage the care of the patient based on that patient's individual needs. All clinical components are also overseen by our Chief Medical Officer. Volunteers and grief counselors provide services as well.

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

As mentioned above, TRU is the only nonprofit hospice organization, serving all vulnerable populations, in Boulder County. However, we do have quite a few community partnerships. UCHealth/Anschutz Medical Campus has chosen TRU as their preferred provider. We are one of two providers that has been granted a General In-Patient (GIP) level-of-care contract at their hospital. AdventHealth Avista in Louisville has also chosen TRU as one of its preferred providers and also awarded us with a GIP contract. TRU was chosen at UCHealth Longs Peak Hospital as the only hospice provider for a GIP contract. And TRU is the premiere preferred provider at Boulder Community Hospital. Additionally, the CEO of Parker Adventist Hospital and the Chief Medical Officer of Porter Adventist Hospital both requested that we expand our territories in Denver to include their hospitals and we now hold GIP contracts in both locations. It is through partnerships like these that reflect the trust the community hospitals have in our services. Additionally, Children's Hospital in Denver requests TRU to care for its pediatric hospice patients. Thankfully, historically, these cases are few.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

Our newest office, housing our state-of-the-art telehealth center, is located in Louisville. Along with the Nursing Professional Development (NPD) team, clinical staff (RNs, LPNs, CNAs, Social Workers), volunteer services, and some administrative offices, we have built a training center using cutting-edge VR technology to provide our clinicians with the most up-to-date medical training.

Additionally, TRU provides education and training at our partner facilities, including AdventHealth Avista in Louisville, on the following topics: Hospice 101, Wound Care, PPE for Covid, Grief for the Professional, Catheter Care, Identifying Pain in Patients with Dementia, and Use of Pain Medications in Patients with Dementia. TRU provides ongoing education as needed.

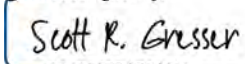
**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Government (federal, state, county, local)	\$500,000	0.8
Private Foundations	\$100,000	0.2
Events	\$180,000	0.3
Individual contributions	\$398,000	0.6
Fees/earned income	\$64,050,000	96.4
Workplace Giving	\$12,000	0.0
In-Kind contributions	\$950,000	1.4
Other	\$255,000	0.4

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature of:


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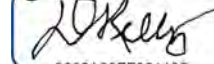
Agency Director
303 604 5241

Telephone Number

scottgresser@trucare.org

E-Mail Address

Signature of:


8662A30FE861405

Board President
303 588 1407

Telephone Number

dkelly@kellylawllc.com

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.

CINCINNATI OH 45999-0038

In reply refer to: 0248367576
Sep. 06, 2016 LTR 4168C 0
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TRU COMMUNITY CARE
% THE ORGANIZATION
2594 TRAILRIDGE DRIVE E
LAFAYETTE CO 80026



022767

Employer ID Number: 84-0748577
Form 990 required: YES

Dear Taxpayer:

This is in response to your request dated Aug. 25, 2016, regarding your tax-exempt status.

We issued you a determination letter in May 1978, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

Our records also indicate you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If a return is required, you must file Form 990, 990-EZ, 990-N, or 990-PF by the 15th day of the fifth month after the end of your annual accounting period. IRC Section 6033(j) provides that, if you don't file a required annual information return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

For tax forms, instructions, and publications, visit www.irs.gov or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).

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Sep. 06, 2016 LTR 4168C 0
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TRU COMMUNITY CARE
% THE ORGANIZATION
2594 TRAILRIDGE DRIVE E
LAFAYETTE CO 80026

Sincerely yours,



Doris Kenwright, Operation Mgr.
Accounts Management Operations 1

GOVERNING BODY MEMBERS

Members		Term Expiration Date
Name: Scott Gresser Broomfield, CO	Title: President & Chief Executive Officer, TRU Community Care Committee: Ethics, Executive, Finance, Governance, Quality of Care, Resource Development, Landmark Advisory	As Employed
Name: Kyle Brown Louisville, CO	Title: Colorado State Representative, House District 12 Officer: Board Vice Chair Committee: Executive, Finance	December 2025 3rd Term
Name: Frank Bruno Boulder, CO	Title: CEO, Via Mobility Services Committee: Governance	December 2024 1st Term
Name: Teresa Cole Fort Collins, CO	Title: Director, IT Technical Services / Supply Chain Committee: Quality of Care	December 2024 2 nd Term (Boulder Community Health Representative)
Name: Kitty deKieffer Boulder, CO	Title: Retired, Fundraising / Finance Officer: Board Secretary Committees: Executive, Landmark Advisory, Finance, Governance, Resource Development Committee Chair	December 2025 2nd Term
Name: Constance Holden Boulder, CO	Title: Founder; The Conversation Project in Boulder Committee: Governance, Landmark Advisory, Advisory Board of The Conversation Project Boulder	December 2024 2 nd Term (The Conversation Project in Boulder, Advisory Board Representative)
Name: Deborah Kelly Boulder, CO	Title: Owner – Kelly Law Office Officer: Board Co-Chair Committees: Finance, Executive Committee Chair	December 2025 3rd Term
Name: Chad Kohlmeyer Boulder, CO	Title: Lead Pastor, Atonement Lutheran Church Committee: Ethics Committee	December 2025 2nd Term
Name: Michelle McParland Arvada, CO	Title: VP Health & Supportive Services, Frasier Meadows Committee:	December 2025 1 st term
Name: David Marusiak Longmont, CO	Title: Senior Vice President, BOKF Committee: Finance, Landmark Advisory	December 2025 1 st Term

Members		Term Expiration Date
Name: Dr. Antony "Tony" Pearson Longmont, CO	Title: Chief Medical Officer, Longmont United Hospital Committee: Quality of Care	December 2024 2 nd Term (Longmont United Hospital Representative)
Name: Vicki Piers Lafayette, CO	Title: Retired, Ball Aerospace Procurement Committee: Resource Development	December 2025 1 st term
Name: Claire Riley Boulder, CO 80304	Title: Retired, Nursing Leader Committee: Executive, Ethics, Quality of Care Chair	December 2024 4th Term
Name: Kelly Rogers Boulder, CO	Title: Retired, marketing Committee: Resource Development	December 2024 1 st Term
Name: David Thrower Superior, CO	Title: Municipal Judge: Town of Superior, CO Officer: Board Co-Chair Committee: Executive, Landmark Advisory	December 2024 4th Term
Name: Jim Topping Boulder, CO	Title: Retired, CU Finance Officer: Board Treasurer Committee: Executive, Finance Committee Chair	December 2025 2nd Term
Name: Hilary Wallace Superior, CO	Title: Physician, Boulder Medical Center Committee: Executive, Resource Development, Governance Chair	December 2024 3 rd Term



2024 Key Staff

Scott Gresser | President and Chief Executive Officer

While completing his third term on our Board of Directors, Scott applied to serve as CFO and successfully transitioned into the role in 2012. A seasoned financial executive with over 20 years of leadership experience in the publishing and broadcasting industries, he oversaw the finance, facilities, information technology, and administrative functions of the agency for ten years. In July of 2022, Scott was appointed President and Chief Executive Officer by TRU's Board of Directors.

Jerry Durst | Chief Financial Officer

Prior to joining TRU, Jerry spent his career in healthcare financial leadership, including home health, hospice, palliative care, long-term care, and behavioral health. For more than 14 years, he worked for Ohio's Hospice, one of the country's largest nonprofit hospices. Jerry holds an accounting/finance degree as well as an MBA from the University of Cincinnati.

Dr. David Wensel | Chief Medical Officer

Before coming to TRU, Dr. Wensel spent 10 years as Chief Medical Officer for hospice, palliative care, home health, and PACE at Midland Care in Topeka, Kansas. There, David was instrumental in developing the PACE program. He also helped to start the palliative medicine consultation service at St. Francis Medical Center in Topeka and one of the first outpatient palliative medicine clinics in a community oncology practice at Topeka's Cotton O'Neal Cancer Center. He is a past chair of the Membership and Communities Committee for the American Academy of Hospice and Palliative Medicine and serves on the Board of Directors for the Hospice Medical Directors Certification Board and the Governance Committee for the American Academy of Hospice and Palliative Medicine. He is also the current chair of the Primary Care Committee for the National PACE Association and serves on that organization's Board of Directors.

James (Jim) Woodard | Chief Operating Officer

Jim Woodard is a seasoned healthcare executive who has 15 years of senior leadership experience. Jim has held leadership positions at Denver Health, Devereux, and Centura Health. He has facilitated the development of a wide variety of innovative healthcare delivery systems that focus on improving care for patients and their families. Most recently, Jim was the Vice President of Patient Care/CNO for Centura St. Thomas More. Jim holds degrees from the University of Northern Colorado and Regis University where he received his MBA.

Samantha Black, LCSW | PACE Executive Director

Sam Black has worked with TRU Community Care since 2007 as a social worker, clinical manager, Vice President of Clinical Services, and now PACE Executive Director. Sam is a leader in the field of hospice and palliative care, with 20+ years' experience as a medical social worker and over 15 years of service in the hospice industry. Sam brings a sensitivity and compassion to TRU's mission that serves families, patients, staff, and volunteers equally well, with a passion for high quality care through outstanding staff training and support, as well as outreach to the community we serve.

2022

ANNUAL REPORT

Affirming life at every step of your journey with illness and loss.



CARING FOR OUR COMMUNITY SINCE 1976



Our **MISSION** is to affirm life at every step of your journey with illness and loss.

Our **VISION** is to lead a healthcare transformation by engaging with our communities and offering innovative, meaningful care for those living with illness and loss.





Dear Friends,

When I reflect on the 2022 year at TRU Community Care, I think about changes, milestones, and new beginnings that impacted our work and our greater community. We began the year offering support groups to those impacted by the tragic Marshall Fire that took place in December 2021. The way our staff and volunteers came together to support our patients and one another still touches my heart. We will go to great lengths to honor our commitment to those we serve. As I write this letter today (in 2023) many of the homes that were lost have been rebuilt and the businesses that were brought to a halt are now thriving.

In April 2022 we said farewell to Michale McHale who served as our President and CEO for five years. I had the pleasure of working alongside Michael throughout his tenure and together we saw incredible growth at TRU. It was my honor and privilege to be named interim President and CEO for four months before officially becoming TRU's next President and CEO. I've been with this organization for more than 15 years and am proud every day I come to work at TRU.

Our TRU Tele-Care program continued to grow and thrive, so much so that we moved into a new, state-of-the-art call center in Louisville to accommodate and better support our telehealth initiatives. We've evolved significantly in an ever-changing healthcare landscape, and it is exciting to work for an organization so committed to innovation and transformation.

It is directly due to your support that we are able to provide the trusted, responsive, and unparalleled services we are known for. From my heart to yours, I thank you.

With gratitude,

Scott Gresser



2022 Milestones

FEBRUARY: Surpassed serving more than 1,000 patients/participants per day

APRIL: Said farewell to President and CEO, Michael McHale, and named Scott Gresser as Interim CEO

SEPTEMBER: Forged partnership with Rocky Mountain Refuge to care for patients experiencing homelessness at end of life

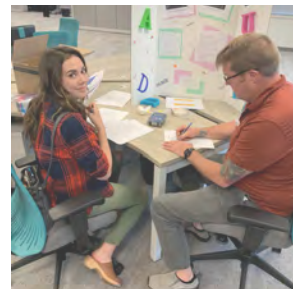
DECEMBER: Exceeded \$1 million in sales at TRU Thrift Shop for the first time

JANUARY: Supported local community in the wake of the Marshall Fires

MARCH: Honored Veterans in a Welcome Home Vietnam Veteran ceremony

JULY: Moved Tele-Care Center to state-of-the-art office space in Louisville, Colorado

OCTOBER: Returned to an in-person format for our annual fundraising luncheon



Our History



1976: Founded as Boulder Hospice, Inc. – the first hospice in Colorado

2005: Thrift Shop and first Grief & Education Center opened in Boulder

2013: Name changed to TRU Community Care to reflect expanding programs and growing service area

2020: Acquired Landmark Memory Care in Lafayette

1999: First hospice inpatient care center in the area opened on Balfour campus

2007: Introduced Palliative Home Health program

2017: Began serving participants through TRU PACE (Program of All-Inclusive Care for the Elderly)

2022: Moved TRU Tele-Care Center in Louisville



Why Hospice Matters

At the center of hospice care is the belief that each of us has the right to die pain-free and with dignity, and that our families will receive the necessary support to allow us to do so. Hospice is a patient-centered philosophy of care that utilizes an interdisciplinary team of professionals to provide compassionate and expert medical care, pain management, and emotional and spiritual support express tailored to the patient's needs and wishes.



What we hear most often from families:

"We just wish we had called you sooner."



"I want to express my gratitude for the tremendous help and support my family in caring for my lovely mother. From when we first made contact and were struggling to find a place for her to live, to her final days, and beyond, your practical assistance and emotional support have been invaluable. Your motto of affirming life at every step was, for me, a new thought, and one that has comforted me this past year."

- Grateful TRU Family Member

Hospice Patients
Served: **1,891**



Palliative Care is Supportive Care

Palliative Care improves the quality of life of patients and their families by relieving the pain, symptoms, and stress of a serious or debilitating illness. Designed to help patients feel better, palliative care can help to relieve symptoms such as loss of appetite, pain, nausea, and sleeplessness, as well as provide help with healthcare decision-making, managing health care, and supporting family members. Palliative care is based on the needs of the patient, not on the patient's prognosis. It is appropriate at any age and at any stage in a serious illness, and it can be provided along with curative treatment.



Palliative Care Patients
Served: **1,090**



The PACE Model

Helping Seniors Stay Safely at Home

TRU PACE (Program of All-Inclusive Care for the Elderly) is a managed healthcare plan exclusively for older adults. TRU PACE participants receive primary medical care, medication management, physical therapy, specialty services, in-home care, social work assistance, and transportation to and from the TRU PACE day center. With TRU PACE, participants can remain living in the comfort of their home and get the medical care they need in a safe environment.

What we hear most often from families:

"This kind of care is just too good to be true."



"My grandmother and my grandfather were both participants of TRU PACE and it just made a great change in their lives. They really felt they were living their lives to the fullest."

- TRU PACE family member

**PACE Participants
Served: 339**



Landmark Memory Care

Landmark Memory Care believes in encouraging independence while offering assistance with compassion and respect, always prioritizing and preserving dignity. It feels like home. Landmark's building and programming are designed for the comfort, socialization, and safety of the residents. Staff specialized in dementia care are on site 24/7. Care plans are customized for each individual and are reviewed and revised as a resident's needs change.

TRU acquired Landmark Memory Care in 2020 in an effort to better serve individuals in our community in need of exceptional memory care.



“There is a heightened sense of teamwork and cooperation amongst staff, both experienced and new to Landmark, that we repeatedly witness and are grateful for. We see staff giving more individualized care and attention to residents who need more help, and they are leading and joining in with activities.”

- Landmark family member

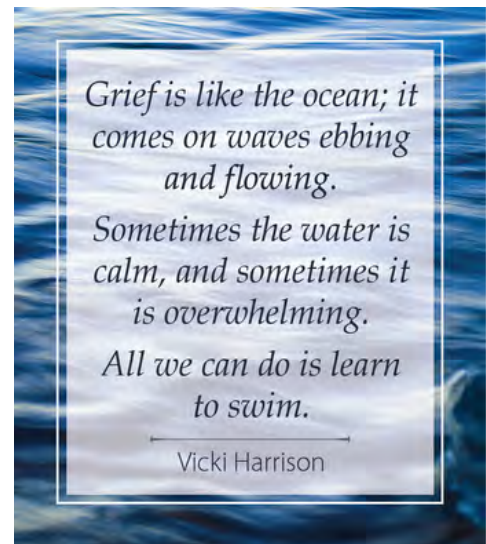


**Landmark Residents
Served: 19**



Walking Through Grief

Grieving a loss can be overwhelming, and counseling often provides the needed support to regain emotional balance to live fully and joyfully again. TRU offers extensive resources for people of all ages and phases in the grief process. In addition to a wide variety of age and loss-specific grief support groups, our experienced grief counselors are available for one-on-one or family grief counseling, phone consultations, and referrals.



Grief Clients

Served: **801**



98/251

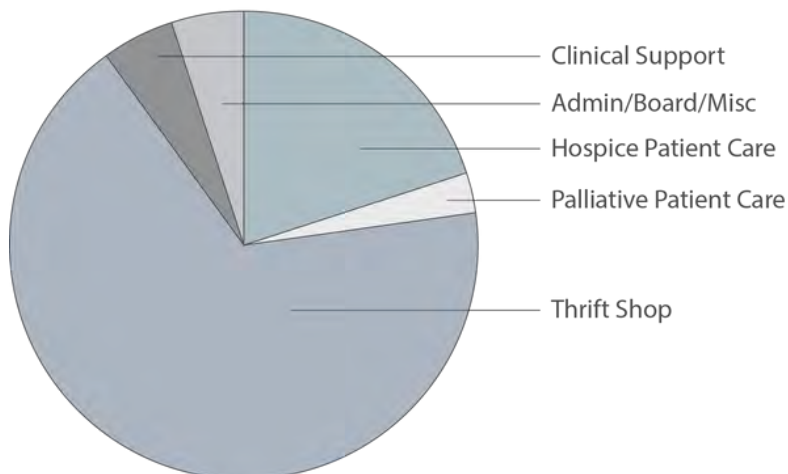


Jessica DeSimone,
2022 Volunteer of the Year

TRU Volunteers

Volunteers are the heart and soul of TRU Community Care. Started by volunteers in 1976 and still partially run by volunteers decades later, we couldn't do what we do without them. Volunteers provide companionship, respite, comfort touch, pet therapy, and more for our patients and families. They run grief support groups, provide administrative assistance, and operate the TRU Thrift Shop. Our volunteer Board of Directors governs the organization and our advisory boards provide valuable insight. Thank you to our incredible volunteers!

Total 2022 Volunteer Hours = 27,066



Active TRU Volunteers: 309



Our Favorite Annual TRU Events

TRU Cares Annual Fundraising Luncheon - 10/20/22

TRU's fifth annual TRU Cares Fundraising Luncheon returned as an in-person event on October 20th at the Boulder Country Club. Supporters, community members, Board members, TRU staff, and volunteers came together to celebrate TRU's important work. Fundraising goals were exceeded, and a memorable time was had by all.



Take Flight Butterfly Release & Memorial - 06/25/22

TRU's fourth annual Take Flight Butterfly Release & Memorial took place at Whitetail Park in Lafayette, CO on June 25th. Painted lady butterflies were released in memory of loved ones! Many participants gathered with family and enjoyed a healing sense of community. Some honored loved ones at cemeteries and memorial sites, and others found comfort in their own backyard, in the mountains, and elsewhere. One participant shared, "What an incredible gift to provide this opportunity and space for hopeful grieving. A new yearly tradition for my family forever!"

Special Thanks To...

Sponsors in 2022:

50 Plus Marketplace Boulder	Gail & Porter Storey	Mike & Wilma Ormsbee
Anne Harris & Dave Samson	Griswold Home Care	OnePoint Patient Care
BOK Financial	Home Instead Senior Care	Robert K. & Sydney M. Anderson
Boulder Medical Center	Horan & McConaty	Sam & Anita Black
Coaching with Ginney	Jim & Monica Woodard	Scott & Marlene Gresser
Constance Holden & TK Smith	Kyle Brown	Sunflower Bank
Daily Camera	Linda L. Norris	The Academy
David & Natalia Wensel	MACE Associates	The Von Eschen Family
Ewing-Leavitt Insurance Agency	Marty Coffin Evans & Robert Trembley, II	Via Mobility Services
Frasier	MBS Nutrition	

Board of Directors in 2022:

Andrea Bernthal	Constance Holden	David Marusiak	Porter Storey
Kyle Brown	Timothy Johnson	John McCarthy	Jill Stravolemos
Teresa Cole	Deborah Kelly	Michael McHale	David Thrower
Kitty deKieffer	Chad Kohlmeyer	Dr. Antony Pearson	Jim Topping
Alicia Echagarruga	Michael Lammers	Claire Riley	Hilary Wallace

Staff *Patients* *Donors* *You!*
Volunteers *Families* *Staff*

TRU Thrift

Reaches a Milestone

TRU Thrift Shop exceeded \$1 million in revenue!

TRU Thrift Shop first opened in 2005 and has been serving Boulder County and beyond ever since. The shop is run by 4-5 passionate employees and more than 100 dedicated volunteers who process donations, assist our customers, work the registers, manage our online stores, and so much more. Thanks to the hard work of this incredible team, TRU Thrift exceeded \$1 million in revenue and made a net contribution of over \$500,000 to support the mission and work of TRU Community Care.



"I shop at TRU Thrift because the merchandise is incredible, and the cause is excellent - not to mention the great staff and volunteers!"

- loyal Thrift customer

\$1,105,247

Thrift Shop Revenue

\$561,939

Net Contribution



102/251

Thanks to You TRU Served ...

1,891 Hospice Patients

1,090 Palliative Care Patients

255 Home Health Patients

801 Grief Services Clients

339 PACE Participants

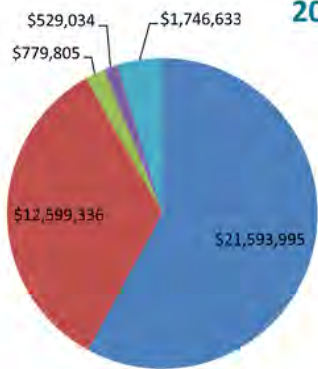
19 Landmark Residents

TOTAL IMPACT: 4,395 Individuals

And their many family members and friends

103/251

2020 Financials

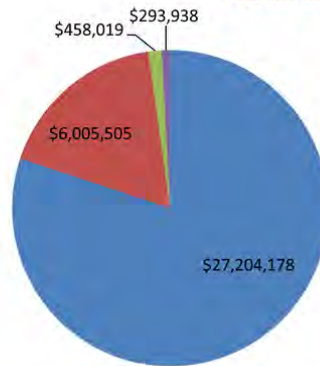


2020 Revenue: \$37,248,803

**2020 Unreimbursed
Charity Care = \$81,298**

**2020 Unreimbursed
Grief Support = \$310,628**

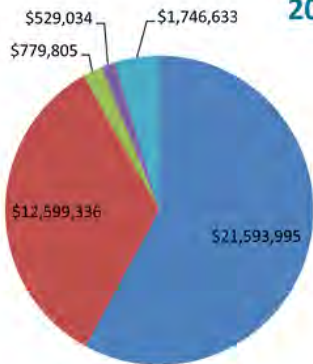
- Medicare Revenue
- Medicaid, Commercial, & Self-Pay
- Contributions
- Thrift Shop
- Investments & Other



2020 Expenses: \$33,961,640

- Program Services
- General & Administrative
- Thrift Shop
- Fundraising

2021 Financials

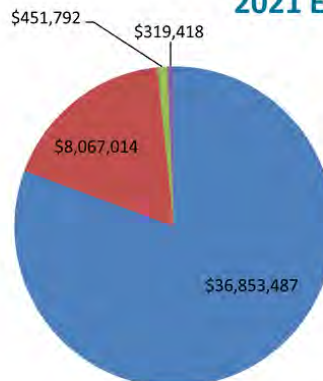


2021 Revenue: \$50,262,730

**2021 Unreimbursed
Charity Care = \$415,191**

**2021 Unreimbursed
Grief Support = \$350,772**

- Medicare Revenue
- Medicaid, Commercial, & Self-Pay
- Contributions
- Thrift Shop
- Investments & Other

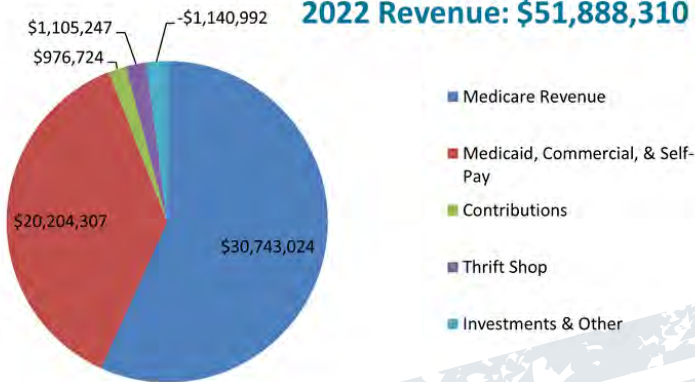


2021 Expenses: \$45,691,711

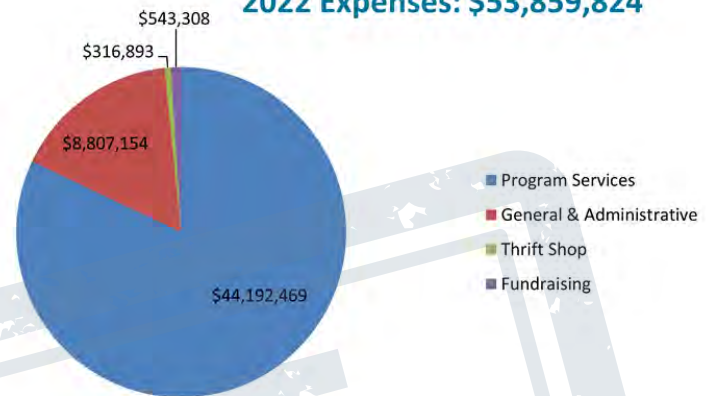
- Program Services
- General & Administrative
- Thrift Shop
- Fundraising

2022 Financials

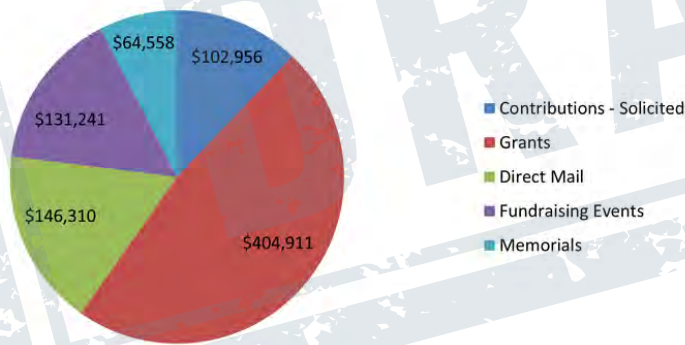
2022 Revenue: \$51,888,310



2022 Expenses: \$53,859,824



2022 Fundraising: \$849,976



**2022 Unreimbursed
Charity Care = \$614,738**

**2022 Unreimbursed
Grief Support = \$358,639**

Services & Supplies Purchased for Patients	2022	2021	2020
Medications	\$3,209,503	\$2,806,578	\$2,430,502
Durable Medical Equipment & Oxygen	\$1,055,210	\$933,670	\$902,913
Patient Medical Supplies	\$304,294	\$316,084	\$314,703
Inpatient & Outpatient Services	\$15,212,820	\$13,776,619	\$7,604,316
Therapies	\$701,260	\$845,412	\$547,811
Diagnostic Tests	\$192,337	\$252,383	\$159,196
Ambulance & Other Transportation	\$826,830	\$562,132	\$475,300
Total Services & Supplies Purchased for Patients	\$21,502,254	\$19,492,878	\$12,434,741



COMMUNITYCARE



TRU Community Care
2594 Trailridge Drive East
Lafayette, CO 80026
(303) 449-7740
trucare.org



TRU Hospice Care Center
1950 Mountain View Avenue
Longmont, CO 80501
(303) 449-7744



TRU PACE
2593 Park Lane
Lafayette, CO 80026
(303) 665-0115
pace.trucare.org

TRU Tele-Care Center
1157 W. Century Dr., Ste 200
Louisville, CO 80027

Landmark Memory Care
1744 S. Public Road
Lafayette, CO 80026
(720) 537-9355
landmarkmemorycare.com

Denver Satellite Office
1415 Park Avenue West
Denver, CO 80205



GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization	<u>Safehouse Progressive Alliance for Nonviolence (SPAN)</u>		
Program Title or "General Operating"	<u>Tri-City Program/Services to Survivors of DV in Louisville</u>		
Contact Person	<u>Alexandra Lynch</u>	Title	<u>Grants Coordinator</u>
Address	<u>835 North Street, Boulder CO 80304</u>		
Telephone	<u>303-260-8413</u>	E-Mail	<u>alexandra@safehousealliance.org</u>
Program Duration (if applicable)	Begin	ongoing	End
Anti-Discrimination Policy (Required)	Yes	☒	No ☐ Other ☐
		<u>2025</u>	<u>2026</u>
Grant Amount Requested for 2025 and/or 2026	<u>\$3,000</u>		<u>\$3,000</u>

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. **Organizational background: What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?**

Safehouse Progressive Alliance for Nonviolence (SPAN) is a human rights organization committed to ending violence against adults, youth and children. SPAN began providing services in 1979. Today a staff of 42 provide immediate crisis intervention and safe, confidential shelter to survivors of interpersonal violence. SPAN also offers a comprehensive continuum of services that foster the self-sufficiency, emotional healing, and stability that survivors and their children need to transcend chronic cycles of abuse. SPAN promotes nonviolence and social justice through violence prevention education, specialized community trainings, and anti-violence/anti-oppression coalition building.

According to Colorado Crime Statistics (<https://coloradocrimestats.state.co.us>), over the past two years the Louisville Police Department has responded to nearly 90 instances of domestic violence. The F.B.I. estimates that only 1 in 10 domestic violence assaults are ever reported to the police, making it safe to say that each year there are several hundred domestic violence incidents in Louisville. In 2023, SPAN supported more than 750 adults and children from Louisville who had experienced domestic violence; through June of 2024, 365 residents of Louisville had accessed SPAN's services.

2. **Program description: What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.**

The SPAN Tri-City Outreach Program, with offices located in Lafayette, provides crisis intervention, counseling, and advocacy for adult and child survivors of interpersonal violence living in the Tri-City area of east Boulder County (Louisville, Lafayette and Superior).

Advocate/Counselors respond to crisis calls, provide individual counseling by appointment or on a drop-in basis, and facilitate support groups for adults and children. Individual counseling sessions provide survivors of interpersonal violence with information and referrals, assistance in developing plans of action, and support in carrying out these plans. Support groups offer survivors opportunities to learn and grow together as they strive to create safe and stable homes for themselves and their children. A bilingual counselor is available at the Tri-City office to provide services for Spanish speaking survivors, and individual and group counseling is also available for children who have witnessed or been victims of abuse. In addition to providing intervention services, staff facilitate community education and violence- prevention presentations in Louisville to raise awareness and reduce the incidents of domestic violence. SPAN requests funding from the City of Louisville to continue providing the following critical services to Louisville residents through the Tri-City Outreach Program:

- **The SPAN Emergency Shelter Program** provides crisis intervention, safe shelter, advocacy, and counseling for adults, youth, and children who have experienced interpersonal violence. Staff and volunteers are available 24 hours a day on our crisis hotline to listen, provide information and referrals to available resources, and conduct intakes for individuals needing immediate shelter. The shelter facility provides a safe, temporary residence for adults and children seeking refuge from an abusive relationship. In addition to food and clothing, residents receive case management, counseling, legal advocacy, and information to help them establish a life safe from violence. Services provided through the Emergency Shelter Program are available in English and Spanish. The shelter facility has a capacity for 27 people and residents may stay up to 45 days.
- **The Advocacy Program** provides crisis intervention and ongoing advocacy for survivors of interpersonal violence involved with law enforcement and the justice system. Victim Advocates offer crisis support immediately following law enforcement intervention. Legal Advocates assist survivors in obtaining protection orders and addressing legal issues related to their experience of violence (including divorce, child custody, and immigration matters), and provide training for prosecutors, judges, and police.
- The **Outreach Counseling Program** addresses a broad continuum of needs, from early intervention to long-term support. Individual and group counseling are offered in English and Spanish in Boulder, Lafayette, and at various community-based locations throughout Boulder County. Population-specific services are available for immigrant and Spanish-speaking survivors, older victims of abuse, and survivors of same sex relationship violence.
- The **Transitional Services/Housing Program** works closely with other community and government agencies to provide long-term, comprehensive support for survivors and their children as they work toward emotional and economic self-sufficiency. Services are provided for an average of two years and include access to affordable housing, long-term case management, and skill-building classes focused on education, careers, job search skills, financial literacy, computer skills, parenting, and nutrition.

3. Program measurements: Provide the following information for the program/activities for which funding is requested:

Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

SPAN's Tri-City Program supports residents of East Boulder County, including Louisville, Lafayette, Superior, and Erie, who have experienced intimate partner violence. In 2022/2023 services to residents of Louisville included: 9 adults and 11 children stayed at SPAN's Emergency Shelter; 60 adults and 31 children/youth participated in individual, group and family counseling; 10 survivors accessed legal advocacy services to address civil, criminal and immigration issues related to abuse; and 35 survivors of violence received wrap-around transitional services, including 12 individuals and families who found stable housing with SPAN's support. Another 689 people from Louisville contacted SPAN's 24/7 Crisis & Information Hotline during this same timeframe, receiving information, support and referrals to SPAN's services and other community resources.

Although domestic violence occurs in every demographic, the people from Louisville who turn to SPAN for help are dealing with the impact of Boulder County's high cost of living. The lack of affordable housing in Louisville and throughout Boulder County has direct and potentially disastrous consequences for victims of abuse. Securing housing can make all the difference between leaving or staying with an abuser, and without it, survivors and their children are at-risk of becoming chronically homeless. SPAN's data shows that the average Louisville client is a white or Latine woman, age 30 to 55, with at least

one child. 95% of SPAN's Louisville clients report annual incomes of less than 30% of the Boulder County AMI. The children served through the SPAN Tri-City Outreach Program are typically 6-13 years of age. In addition to witnessing the abuse of their mother, 30% have been physically or sexually abused. SPAN is serving a growing number of older survivors from Louisville. The number of women aged 50 and above seeking counseling and advocacy services from SPAN has quadrupled in the last decade, with the number of older adults accessing SPAN's services climbing exponentially in the past decade. This is particularly true in the City of Louisville, where nearly half of the people from the city seeking SPAN's services are aged 50+.

Qualitative measures: How will you measure the success of this program/activity?

SPAN employs evidence-based evaluation strategies that focus on proven indicators of positive long-term outcomes for survivors of violence and their children. These indicators include survivors feeling less isolated and more connected to a community that cares about them; that they have a better understanding of the dynamics of abuse and its impact on their health and well-being, and that of their children; and that they have developed strategies for staying safe. SPAN also uses evidence-informed assessments to track changes in stability and self-efficacy as clients enter SPAN's services, while they receive services, and upon exit, giving us valuable insights into programmatic effectiveness. Feedback from clients, anonymous survey results, and assessments are collected, documented, and analyzed by staff and SPAN's leadership team on a monthly, quarterly, and annual basis.

Evaluation: If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

Boulder County's rapidly rising cost of living and the impact of inflation in 2023/2024 continues to put low-income, marginalized survivors at high risk for chronic instability and re-victimization. Since the pandemic, survivors have increased needs for financial assistance for rent, food, and transportation. Much of the financial support to meet these needs over the past three years came from American Recovery Plan Act (ARPA) funds. ARPA funds expire in 2024, just as the COVID-related expanded federal food and medical care benefits were cut last year. While these COVID-related resources are ending the increased needs of low-income, marginalized survivors in Louisville and their children are not, and SPAN's programs saw significant increases in requests for services in 2023. Despite being short-staffed for much of the year, SPAN's Legal Advocacy Program supported 49% more survivors in 2023 than the year before, and SPAN's Transitional Services/Housing Program supported 31% more people than in 2022. Last year 146 children and youth stayed at SPAN's Emergency Shelter with their survivor/parent, more children than in any prior year in SPAN's 45-year history. SPAN has leveraged significant state and federal funding to support the needs of survivors, including providing more than \$900,000 in financial support for survivors since the pandemic. This includes \$11,450 provided to residents of Louisville that helped keep survivors and their children in stable housing, as well as pay for transportation and childcare so they could access or maintain employment.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

Leadership:

How many people serve on your Board of Directors and how many of these are Louisville residents?

SPAN has 12 Board Members and one of them, the Board Vice Chair, is a resident of Louisville.

How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

SPAN has 42 people on staff, with a full-time equivalent of 40.75. Five SPAN staff members are residents of Louisville.

Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.

SPAN's Volunteer Program was suspended during the pandemic, as we limited the number of people interacting directly with clients to reduce the risk of spreading the COVID virus. Since 2023, we have been focused on re-engaging with volunteers with a goal of recruiting and training at least 50 new volunteers this year. Direct service volunteers support staff at the Emergency Shelter, supervise children's playgroups, and serve at SPAN's Protection Order Clinic at the Boulder County Courthouse. Volunteers also work on administrative projects, helping to staff the reception desk at SPAN's Boulder Outreach Center, support SPAN's fundraising efforts, and serve as Board members. In 2023, 78 volunteers donated 12,090 hours to SPAN.

Who will be responsible for the administration of the program or service?

Individual program services are supervised by SPAN's Program Directors, including the Co-Directors of Shelter & Housing, the Outreach Counseling Program Director, and SPAN's Legal Advocacy Program Director. Overall grant management, reporting and financial oversight are the responsibilities of SPAN's Director of Finance & Operations, with support from the Grants Coordinator.

Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

SPAN is the only domestic violence intervention and prevention non-profit serving Louisville. SPAN engages in diverse and innovative partnerships to increase resources for survivors and to strengthen the community's response to domestic violence and its impact on low-income and marginalized survivors. Our routine collaborations are a key part of the overall coordinated community response to the needs of survivors and their children and include working closely with Boulder County Department of Housing & Human Services, Boulder County Housing Authority, Boulder Housing Partners, other non-profit agencies including family resource centers, Community Food Share, Boulder Shelter for the

Homeless, and Boulder County's Area Agency on Ageing. As part of our commitment to supporting marginalized communities, SPAN also works to create substantive and mutually supportive relationships with other non-profits. To better support Latinx survivors of violence SPAN also collaborates with organizations like the Boulder County Latino Taskforce, Colorado Immigrant Rights Coalition, El Centro AMISTAD, and Intercambio de Comunidades. To support LGBTQI+ survivors of relationship violence, SPAN works closely with Rocky Mountain Equality, CU Gender and Sexuality Center, and Boulder County AIDS Project.

Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

SPAN has experienced a steady increase in requests for support from survivors in Louisville and East Boulder County since the pandemic. Local funding that was supported by the American Recovery Plan Act (ARPA) funds and that helped SPAN meet these increased needs is set to expire soon. At the same time, this fall the Colorado Department of Public Safety, Division of Criminal Justice, Office for Victims Programs (OVP), a major funder for SPAN's services, announced cuts between 40%-50% of current funding levels, a revenue loss of up to \$280,000 a year for SPAN starting in 2025. SPAN staff and our Board of Directors are engaged in exploring strategies for mitigating the negative impact of these cuts, and we look to our core community support, like the City of Louisville, to help keep SPAN's life-changing services strong and intact.

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

SPAN Tri-City Program – Services to Survivors of Domestic Violence in Louisville

Source of Funding	Estimated Funding Amount	Percent of Total
Colorado Office of Victim Programs – Crime Victim Services – VOCA	\$75,020	25%
Family Violence Prevention & Services Act	\$9,690	3%
State of Colorado DVP	\$9,130	3%
Boulder County	\$23,910	8%
City of Lafayette	\$35,000	12%
City of Louisville	\$3,000	1%
20 th Judicial District – VALE	\$20,100	7%
Broomfield County	\$20,000	7%
Foundations	\$20,820	7%
Fundraising & Contributions	\$80,875	27%

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.



Signature

Anne Tapp, Executive Director

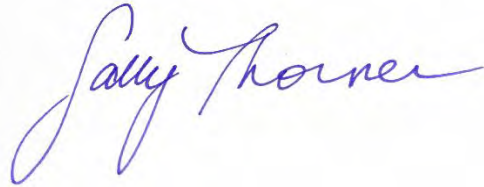
Agency Director

303-449-8623

Telephone Number

anne@safehousealliance.org

E-Mail Address



Signature

Sally Thorner, Board Chair

Board President

303-449-8623

Telephone Number

director@safehousealliance.org

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.

Safehouse Progressive Alliance for Nonviolence - Board of Directors - 2024

Board Member & Position	City/County Residence	Occupation/Professional Affiliation	Term Date
Sally Thorner, Chair	Boulder, CO 80304	Journalist, Self Employed	April 2016- April 2026
Judy Knapp, Vice Chair	Louisville, CO 80027	Retired, Lockheed Martin	June 2006 – December 2026
Peter Burr, Secretary	Boulder, CO 80303	Software Program Manager, Trimble Sketch Up	May 2021 – May 2025
Chris Maughan, Treasurer	Boulder, CO 80302	President, Alpine Bank	December 2018 - December 2026
Hanna Bustillo	Frederick, CO 80530	Attorney, WheelerTriggO'Donnel, LLP	July 2024 – July 2027
Anna Frick, Member	Boulder, CO 80301	Owner, Mastering and Restoration Engineer, Ally Sound, LLC	July 2022 – July 2025
Amy Gestal, Member	Boulder, CO 80304	Director, Vendor Finance Huntington Technology Finance	January 2022 - January 2025
Spencer King, Member	Boulder, CO 80304	Physician, Onpoint Urgent Care	July 2024 – July 2027
Jennifer Messina, Member	Longmont, CO 80503	Parish Administrator, St. Mary Magdalene Episcopal Church	June 2023 – June 2026
Debbie Ramírez, Member	Boulder, CO 80305	Volunteer Coordinator, Boulder County Dept. of Housing & Human Services	May 2014 – December 2024
Dagny Scott, Member	Boulder, CO 80305	Founder, Fearless Unlimited Strategic Communications and Branding	July 2024 – July 2027
Denise Walker, Member	Lafayette, CO 80026	Legislative Aide, Colorado State Senate	November 2019- November 2024
Linda Damon	Boulder, CO 80304	Aurora Public Schools, Retired	Honorary Board Member
Reggie Schmidt	Louisville, CO 80027	Enrichment Kindergarten Specialist, BVSD, Retired	Honorary Board Member
Lydia M. Tate	Boulder, CO 80305	Attorney, Retired	Honorary Board Member

100% of SPAN Board members contribute financially to the organization.



Department of the Treasury
Internal Revenue Service

Cincinnati Service Center
CINCINNATI OH 45999-0038

In reply refer to: 0256410411
Jan. 17, 2024 LTR 4168C 0
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SAFEHOUSE PROGRESSIVE ALLIANCE FOR
NONVIOLENCE INC
835 NORTH ST
BOULDER CO 80304-3223

024433

Employer ID number: 74-2145368
Form 990 required: Yes

Dear Taxpayer:

We're responding to your request dated Jan. 09, 2024, about your tax-exempt status.

We issued you a determination letter in March 1981, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(03).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m.,

116/251

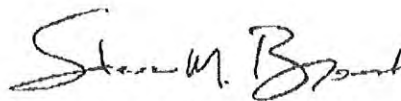
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SAFEHOUSE PROGRESSIVE ALLIANCE FOR
NONVIOLENCE INC
835 NORTH ST
BOULDER CO 80304-3223

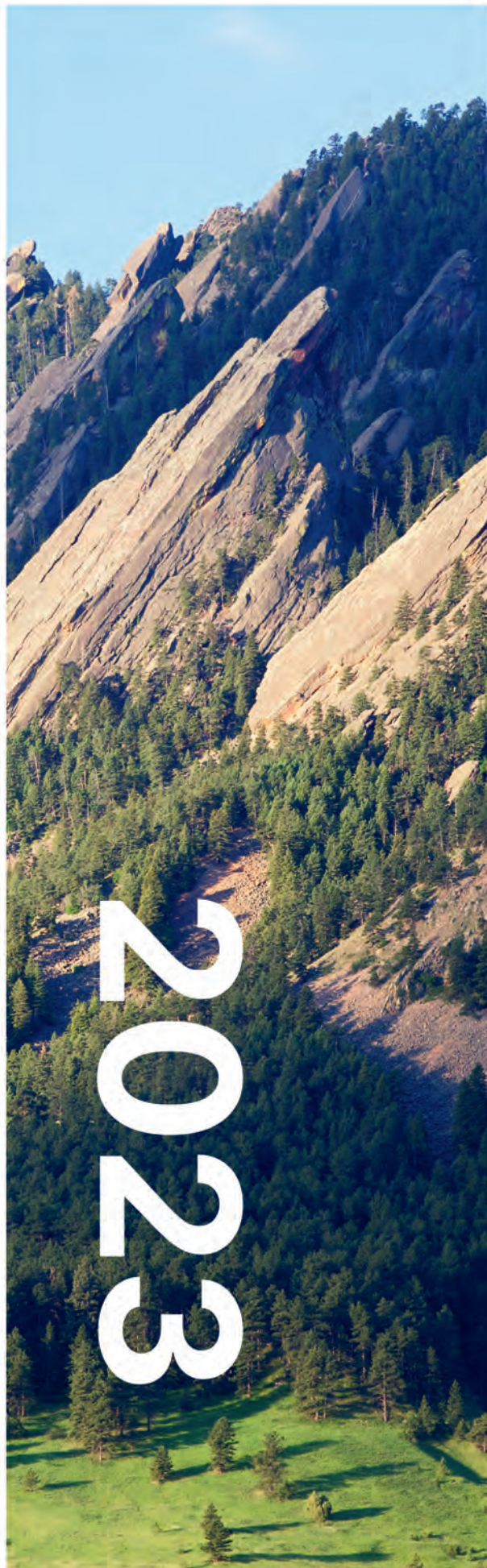
local time, Monday through Friday (Alaska and Hawaii follow Pacific
time).

Thank you for your cooperation.

Sincerely yours,

A handwritten signature in black ink, appearing to read "Steve M. Brown". The signature is fluid and cursive, with the first name "Steve" and last name "Brown" clearly distinguishable.

Steve M. Brown, Operations Manager
Operations 3-CIN



2023



Annual Report

303-449-8623 | 303-444-2424
info@safehousealliance.org
www.safehousealliance.org

Our work

Every year, SPAN connects and supports thousands of survivors of domestic violence and their families in Boulder and Broomfield counties. SPAN's emergency services are a lifeline for many survivors, providing immediate safety and essential support during moments of crisis. **For many survivors, escaping an abusive environment is fraught with danger and uncertainty; emergency services offer a secure refuge where they can begin the process of healing without fear.** The availability of these services can mean the difference between life and death, ensuring that survivors have access to the resources they need to protect themselves and their families.

In 2023, SPAN services provided immediate protection, essential resources, and compassionate support, enabling survivors to escape abusive situations and begin their journey towards healing and independence. Our commitment to maintaining and expanding these services is at the heart of our mission, as we strive to create a community where everyone can live free from violence and fear.



Working together to create positive social change and end violence – for good.

From our Executive Director

Dear friends,

2023 was another year of challenges and inspiration at SPAN.

As SPAN's Executive Director, I often think about the challenges in terms of numbers, like the more than 10,000 calls to SPAN's Crisis Hotline in 2023; the 1,800 adults and children who turned to SPAN for help; the more than \$3 million it took to keep SPAN's services strong last year. When it comes to inspiration, I think of stories.

There's "Mary", a 72-year-old woman with dementia who endured years of abuse by her now-deceased husband, then by her adult son. Mary was referred to the SPAN Emergency Shelter by one of our community partners serving older adults. With support from the Shelter staff, Mary found long term housing at a memory care facility. Our Legal Team assisted Mary with a protection order and her son is no longer a threat.

Or I think about "Jose", a 12-year-old boy who struggled with rage-filled outbursts and was convinced he would grow up to be abusive like his stepdad. After he had experienced a series of art therapy sessions at SPAN, Jose told his counselor "I know now that my anger is part of me, but it's not all of me. I am a good kid, and I'll be a good dad someday."

SPAN is making a difference. SPAN is changing lives, even saving lives. And none of this is possible without our community of supporters like you. Together we can meet the challenges ahead and continue to tell stories about SPAN's positive impact. Thank you!

With grateful thanks,



Anne Tapp



From our Board Chair

Dear Friends,

Domestic violence is all too familiar of a lead story in local news. In my career as a news anchor, I regularly referred to the vicious cycle of violence without truly understanding what that meant. It's only fitting that my work with SPAN has enlightened me profoundly on this matter.

Before joining the Board of Directors, my main contribution to SPAN was helping survivors share their deeply personal stories with a hotel ballroom full of strangers. 30 years in broadcast journalism provides a reasonable background for this. Whether co-writing scripts or coaching public speaking, this was something I could contribute. But what I received in return was far more valuable.

Aha moment came when the SPAN staff chose Leaha Silvas as the speaker for our 42nd Annual Chocolate Lovers' Fling gala. Leaha had an extremely abusive partner, and she shared the tremendous impact this had on her children. **Leaha's children were on their way to perpetuating the vicious cycle of violence, getting in fights at school and lashing out to express their emotions.** Leah explained to me, and eventually to a much larger audience, how SPAN interrupted that cycle. Through comprehensive support and resources, SPAN provided Leaha and her family with the tools they need to break free from the patterns of abuse and build a safer future for everyone.

As I review SPAN's annual report, I find myself imagining it as our last. Behind all these statistics lies real change. **Behind every statistic, there are lives transformed, futures rebuilt, and cycles of violence broken. Our accomplishments this year are a testament to the power of community and the resilience of the human spirit.**

On behalf of the Board of Directors, thank you for standing with us, for believing in our mission, and for helping us make a lasting impact on the lives of survivors of domestic violence and their families.

With heartfelt gratitude,

Sally Thorner

Sally Thorner, Board Chair



Shelter & Housing Programs



10,077 crisis calls answered by trained, trauma-informed Advocates.

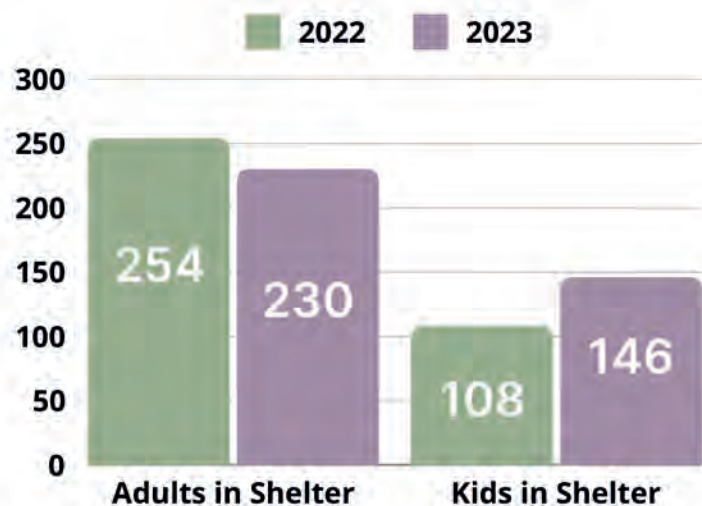


9,315 total bed nights in our safe, confidential Emergency Shelter.

In 2023, we saw a 34% increase of children in our Emergency Shelter from 2022. Meaning, we sheltered more kiddos than ever who had witnessed extreme violence in their household. Violence has profound and lasting effects on children, shaping their emotional, psychological, and social development in significant ways.

Here at SPAN, we know how imperative it is to provide comprehensive support and trauma-informed services to help these young survivors heal and build a foundation for a healthier future.

Clients in Shelter



359 survivors supported in our Transitional Housing and Economic Justice Program.



Transitional housing opportunities are crucial for survivors of domestic violence, offering a critical bridge between our Emergency Shelter and long-term stability. By addressing both immediate and long-term needs, our programs empower survivors to break free from the cycle of violence, paving the way for a future where they can thrive independently and with dignity.



Legal Advocacy & Counseling Programs



The implementation and strengthening of the Lethality Assessment Protocol (LAP) has increased SPAN Legal Advocacy referrals and support by 49% in 2023. LAP is an evidence-based approach to reduce intimate partner homicide, increase survivor safety, and build connection with community-based resources.



377 survivors received support and resource navigation in our Legal Advocacy Program.



457 adults and 245 children received client-centered services from our Counseling Program.

Our Counseling Program is essential for survivors of domestic violence, providing a safe and supportive space for them to process their experiences and begin the journey toward healing. Through individual and group counseling sessions, survivors can share their stories, gain insights from others with similar experiences, and build a network of support. Emotional and psychological healing is fundamental to restoring a survivor's sense of self-worth and empowerment. **Here at SPAN, we believe healing happens in community with each other.**



Education Program

4,579 Boulder Valley School District (BVSD) middle and high school students received our Violence Prevention Curriculum.

Implementing violence prevention curriculum in schools is vital for fostering safe and respectful learning environments while shaping a generation that rejects violence. This curriculum empowers students with knowledge about healthy relationships, effective communication, and understanding and practicing consent. SPAN works to equip youth with the tools to recognize and prevent abusive behaviors.

SPAN has provided evidence-based violence prevention education in the Boulder Valley School District for more than 20 years.

7th

Introduction to Relationships
Gender, Sexuality & Toxic Gender Roles
Regulating Emotions

8th

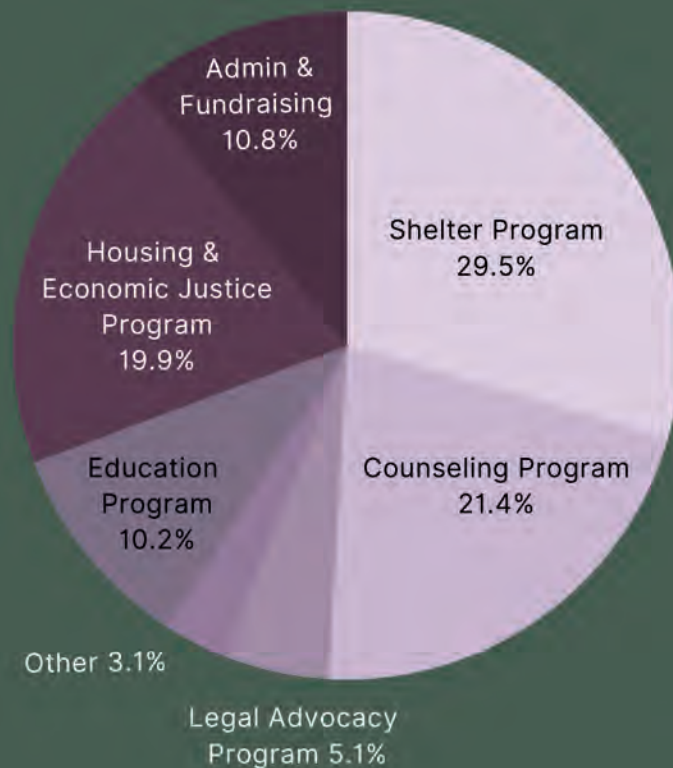
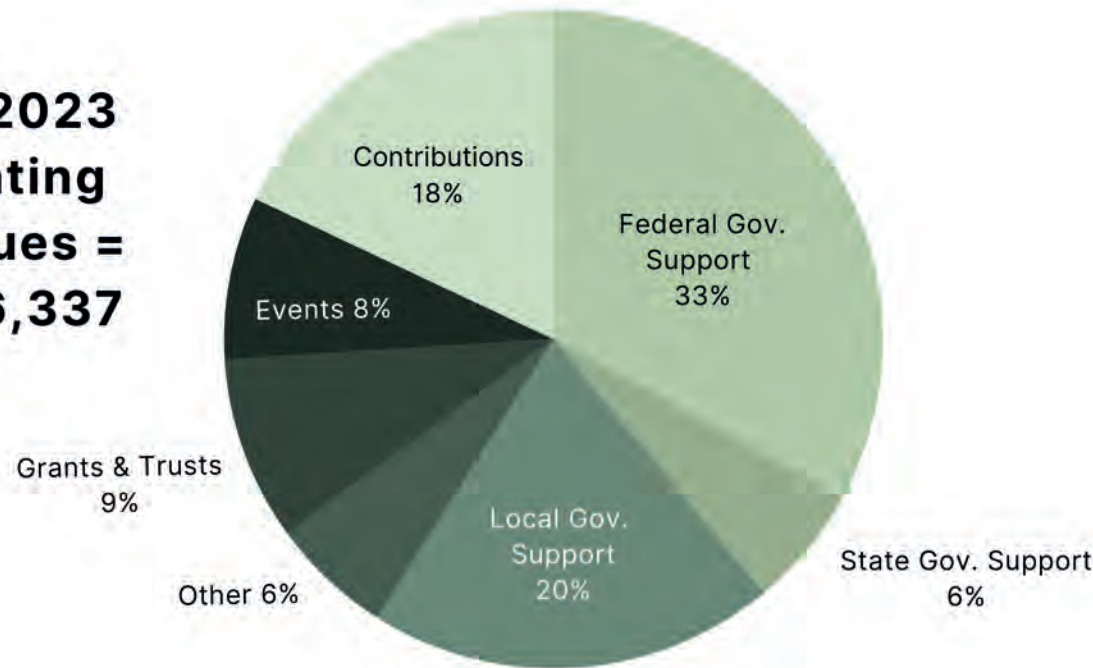
Cycle of Violence
Boundaries, Consent, and Sexual Violence
How to Support a Friend

9th

Introduction to Relationships
Cycle of Violence
Boundaries, Consent, and Sexual Violence
How to Support a Friend

2023 Financial Totals

**Total 2023
Operating
Revenues =
\$3,616,337**



**Total 2023
Operating
Expenses =
\$3,165,693**

Our Team



Anne Tapp | Executive Director

Lisa Van der Veer | Finance & Operations Director

Aparna Harris | Development Director

Erin Shannon | Education Program Director

Mallory Woodman | Legal Advocacy Director

Nicole Borelli | Housing & Economic Justice
Program Director

Tsunemi Maehara | Counseling Program Director

Sally Thorner | Board Chair

Judy Knapp | Vice Chair

Chris Maughan | Treasurer

Peter Burr | Secretary

Amy Gestal | Member

Anna Frick | Member

Debbie Ramirez | Member

Denice Walker | Member

Jen Messina | Member

All rights, powers, duties, and responsibilities relative to the control of SPAN's property and affairs are vested in the Board of Directors.



Safehouse Progressive Alliance
for Nonviolence

835 North Street
Boulder, CO 80304

NON-PROFIT
ORG
U.S. POSTAGE
PAID
BOULDER, CO
PERMIT #84

Everyone deserves a safe home.



You can support survivors
and help build a safer
community TODAY.

www.safehousealliance.org

Connect with us!



@FollowSPAN



@FollowSPAN



@FollowSPAN_Boulder



@Safehouse Progressive Alliance for Nonviolence

To receive our eNews blasts, email us at
info@safehousealliance.org.



Hope for the future, help when you need it.



Mile High United Way



127/251



GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization	Boulder County RSVP Board, Inc DBA Cultivate			
Program Title or	General Operating			
Contact Person	Chrysti Britt	Title	Executive Director	
Address	6325 Gunpark Dr. # F Boulder CO 80301			
Telephone	303-443-1933 x 415	E-Mail	crbritt@cultivate.ngo	
Program Duration (if applicable)	Begin	Ongoing	End	Ongoing
Anti-Discrimination Policy	Yes x No			
Grant Amount Requested for	2025	2026		
	\$ 3,000	\$ 3,000		

CITY OF LOUISVILLE, COLORADO GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. **Organizational background:** What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

In 1972 older adults came together to find solutions for critical issues they faced as they aged. Thanks to their initiative, Boulder County RSVP Board Inc., dba Cultivate, joined a growing peer-driven movement to promote self-sufficiency, dignity and concrete solutions. Over the past 52 years, our organization continues to take inspiration from our founders who came together to share their strengths and mitigate their challenges. Cultivate provides unique services, which minimize isolation, meet basic human needs and help prevent unnecessary institutionalization. In July 2023, Cultivate began service delivery to Weld County seniors. Overall, in 2023, Cultivate's direct and community services reached over 7,000 residents over the age of 60 and their family members. Cultivate promotes self-sufficiency, safety and health, despite advancing age or ability. We are an innovative leader in the field of aging services and our Safety Net Services make a true impact on older adults' ability to age in place with support and dignity.

According to BCAA (2024), the two-decade long growth of Boulder County's 60+ population will grow an additional 15% by 2050, with the most significant growth (220%) in the 80+ population. The pressing issues facing Boulder County are Aging in Home and Community; Transportation; Housing and Supporting Caregivers. Cultivate services are designed out of a need that is empirically identified within Boulder County – no-cost support for those aging at home; medical transportation; in-home safety modifications; and respite services for caregivers.

Further, U.S. Surgeon General Dr. Vivek H. Murthy (2023) declared loneliness and isolation a public health epidemic, and 37% of Boulder County's older adults say feeling lonely or isolated is at least a minor problem. Research directly links social isolation to a 29% increased risk of premature death, heart disease (29%), stroke (32%), diabetes, anxiety, depression, suicide, dementia and respiratory illness.

Through Cultivate's free Safety Net Services, we not only provide services to meet the critical needs of food access, transportation to healthcare and personal safety, we facilitate and provide social connections that directly combat social isolation. Our staff and volunteers, many of whom are 55+, regularly engage together to create bonds and community between clients and volunteers. Clients report that as a result of Cultivate they experience increased social support, more connection to the community, are able to remain in their home and experience less emotional and physical stress.

By providing seniors the tools they need to age independently in their homes and communities, we provide a critical resource for older adults who face increasing medical, housing, utility and other costs resulting from a booming economy. Additionally, and equally as important, Cultivate's intentional connections between community members directly increase social connections and positively impact our clients' and our volunteers' health and wellbeing.

As stated by Murthy (2023) and evidenced by Cultivate's programming, "the impact of social connection not only affects individuals, but also the communities they live in. Social connection is an important social determinant of health, and more broadly, of community well-being, including (but not limited to) population health, community resilience when natural hazards strike, community safety, economic prosperity, and

representative government.”

2. **Program description:** What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

Cultivate provides six Safety Net Services which directly impact adults age 60+ and three Community Services, all of which create meaningful volunteer opportunities that impact the quality of life of older adults and their families. Cultivate programs are provided free of charge and provided to anyone living within the boundaries of Boulder County, including Louisville. While we provide services in Broomfield and Weld Counties, this program description focuses on the services and number of clients in Boulder County.

2025 direct service goals for the organization are:

- Carry-Out Caravan: Grocery delivery service. Reliable access to nutrition through grocery delivery. Deliverables are 4,500 grocery orders to 300 clients through service from 125 volunteers (provided since 2002).
- VetsGo: Escorted rides to and from medical appointments; reliable access to medical care for older adult Veterans and their senior family members. Deliverables are coordinating 1,500 rides for 115 clients with 40 volunteers providing transportation services (provided since 2008).
- Fix-It: Minor home repairs, wheelchair/walker repairs, and grab bar installation; fall prevention. Deliverables are 1,300 service hours provided by 30 volunteers to 275 clients (provided since 1970s).
- YardBusters: Basic yard clean up; injury prevention. Deliverables are 800 service hours to 80 clients provided by 100 volunteers (provided since 2012).
- SnowBusters: Snow and ice removal; fall prevention. Deliverables are 2,000 service hours to 100 clients provided by 80 Volunteers (provided since 2012).
- PhoneBuddies: Regular phone calls from volunteers to clients; reduce and combat isolation. Deliverables are 120 hours of phone calls to 10 clients made by 10 volunteers (provided since 2021).

While individual program goals are set, environmental factors, such as weather, may shift individual program outputs. But, the total number of annually served clients and services provided will be fulfilled.

2025 community service goals for the organization are:

- RSVP 55+ Volunteer Program: Volunteer match service for seniors in the community. 275 volunteers will serve 19,000 hours.
- File of Life: Free medical information cards to assist emergency responders. 1,500 packets distributed.
- Resources & Referrals: Personal contact with clients and callers to assist them in requesting our services or help them find other appropriate community services. 4,000+ callers helped.

3. **Program measurements:** Provide the following information for the program/activities for which funding is requested:

- Quantitative measures:

Cultivate plays an essential part in making Louisville and the rest of Boulder County an age friendly community by serving the senior population. Vulnerability among seniors includes economic insecurity, social isolation, inadequate housing, inaccessible transportation, food insecurity, marginalized identities and other barriers to community and services. Boulder County census data reports the Area Median Income in Boulder County to be \$93,000 in 2024. More than 94% of enrolled Cultivate Safety Net Service participants that provide income documentation live near or below the federal poverty level.

Cultivate collects daily quantitative client data and evaluates this monthly to ensure programs are progressing appropriately toward annual goals. In 2023, 85% of clients served in Louisville were female; 54% of Louisville clients had a self-reported disability or mobility issues; and 89% of Louisville clients that reported income were classified in the Boulder County Area Median Income as extremely low income to low income. 20% were in their 60s, 46% were in their 70s, 27% were in their 80s and 7% were in their 90s.

- Qualitative measures: How will you measure the success of this program/activity?

Cultivate uses the Social Determinants of Health, the evidence-based model that represents the broad range of social and physical factors that impact health and quality of life, to ensure the effectiveness and relevance of our Safety Net Services. We focus on three Determinants: Food and Nutrition; Health and Well-Being; and Safety as our model for structuring and implementing our programs. We use an Evaluation Cycle that includes planning, implementation, data collection, analysis and reporting. We review progress monthly and respond to program challenges. We build into our evaluation process the “theory of change” model. We document all activities, outputs, outcomes and success measures to evaluate our programs. We document all requests for program services and document outcomes using quantitative data and client surveys. In addition to quantitative data, we regularly solicit feedback from volunteers and clients, and conduct program-specific surveys to help evaluate program impact, achievement and areas that need to be modified or improved.

Based on annual client surveys conducted each spring, we anticipate 85% of Safety Net clients served will report feeling a greater sense of independence, will have more social support, will have greater access to food and will have more confidence in their ability to age in place.

4. **Evaluation:** If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

Successes

The most recent evaluation indicates that of those who gave us an opinion:

- 98% experience increased social support
- 97% experience more connection to the community
- 99% experience the ability to remain in their home
- 93% experience less emotional and physical stress

Cultivate’s greatest continued success is the service we provide to the older adult community. In 2023, we increased the overall number of direct service clients by 5% over 2022. Additionally, our VetsGo transportation program saw a 15% increase in service delivery over 2022, Fix-It home repairs completed 43% more service hours over 2022 and YardBusters resulted in a 24% increase of service hours over 2022.

Challenges

Even though the number of aging adults is exploding (according to BCAA (2024), by 2030 one of every five adults in Boulder County will be over the age of 65), and the need for our services has continued to rise, funding to support older adults has drastically declined. Aging Well in Boulder County: Data Report (2024) further explains the lack of funding by pointing out that “Colorado’s 16 Area Agencies on Aging are back to Fiscal Year 2019 funding levels. This is despite an increase in our older adult population, the high cost of living in Colorado, the increased cost to provide services, and increasing inflation. Our community, state, and nation are facing a serious human services crisis,

especially for our aging population. Current funding levels are nowhere near enough to provide adequate support for older adults and their caregivers.”

The Cultivate Board of Directors Fundraising committee has been very active in supporting the Executive Director and the Organization to identify and secure new funding to ensure our sustainability for 2024 and beyond. With less and less funding since 2019 combined with a 22.7% inflation rate, Cultivate has had to reduce staff, benefits and other operating expenses so that we ensure that we do not reduce the number of clients we serve or the quality of programs we provide.

Lessons Learned

Cultivate continues to hear (and ensure) that access to our services is provided in a variety of ways to engage the older adult population in the method they are most comfortable with and that bridges the digital divide – as many older adults either do not have access to the internet or are not comfortable interacting online. Clients can enroll in our services online, on paper, through fax and over the phone. There are certain instances where staff will personally visit clients to help them through the enrollment process. We can be easily contacted by phone, email or in-person, ensuring those who have technology gaps, limited mobility, decreased vision or other obstacles can easily enroll in and request services.

Cultivate focuses on improving access to our services for all adults age 60+. According to the World Health Organization’s Global Report on Ageism (2021), “as a public health problem, ageism is an important social determinant of health that has too long been neglected. But ageism is also a development and human rights issue with serious consequences.” Ageism is underrecognized as an issue that intersects with racism, sexism, classism, transphobia, heterosexism, ableism and more. It is imperative that local communities begin to recognize what global entities have long known – older adults are, and continue to be, an underrepresented and underserved population.

According to the Boulder County Area Agency on Aging (BCAAA) Aging Well in Boulder County: Data Report (2024) “ageism shortens lives; leads to poorer physical health and worse health behaviors; impedes recovery from disability; results in poorer mental health; exacerbates social isolation and loneliness; and reduces quality of life. Nearly half (45%) of Boulder County older adults rate valuing older residents in their community as fair or poor.”

Cultivate has always approached outreach in a way that is welcoming to all older adults that live in Boulder County as we have seen the discrimination that older adults experience simply because they are aging. However, we do place an outreach focus on low-income seniors. Our services are offered at no-cost and we do not provide services based on ability or choice to donate. Our 5-year trend shows that 93-96% of clients who report income are at or below the Federal Poverty Level. Our ongoing partnerships with many local organizations (MOW Boulder and Longmont, BHP properties, Golden West, Community Food Share, Harvest of Hope Pantry, etc.) assist us in locating and supporting more low-income seniors. And, we continue to connect with other organizations in order to increase the number of places that know about our services for their clients.

Cultivate does recognize and has identified opportunities in our programs where we can provide more culturally competent programming to better serve our BIPOC clients. According to the US Census (2022), 8.5% of Boulder County’s 60+ population report they are BIPOC, which is 50% lower than the overall reported BIPOC population in Boulder County at 17.2%. Cultivate’s five-year trend of Boulder County clients identify as 6.5% BIPOC. According to our anecdotal experience and as noted by BCAA (2024), BIPOC families live with more communal cultural values than white or white-assimilated families. We have

experienced that these multigenerational households or those with families who live close in proximity tend to keep caregiving within their own family. However, in order to expand access and improve the cultural relevancy of our programming, in Q4 2024, Cultivate will begin offering grocery shopping and delivery services at both Asian and Latino markets to allow our clients access to more culturally diverse food items.

5. **Leadership:**

- How many people serve on your Board of Directors and how many of these are Louisville residents?

Cultivate Board of Directors is made up of 10 individuals, with one member a resident of Louisville.

- How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

Cultivate employs 5.5 FTE staff, none of whom live in Louisville

- Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.

Volunteers developed our Safety Net Service and outreach programs in the 1980s in response to critical community needs. Volunteers remain at the heart of our programs. Volunteers serve in leadership roles and provide direct service to clients once they complete background checks, orientation and training. In 2023, 786 volunteers generously donated 24,185 hours of their time and talent to Cultivate Safety Net Services and the RSVP program. Cultivate staff provide flexible orientations, trainings and recognition events. Most importantly, we have an ongoing conversation with volunteers to strengthen our programs and learn from their innovative ideas about how we can best serve our communities. Many volunteers are over the age of 60, some well into their 90s, and may be both Cultivate volunteers and clients. These individuals bring a unique perspective to our organization. Recruiting new volunteers and adapting to the changing schedules and needs of community volunteers is an ongoing process as we continue to respond to the needs of our growing senior population.

- Who will be responsible for the administration of the program or service?

Chrysti R. Britt, MS - Executive Director (start date April 2015)

Professional in the fields of civil services, human services, emergency medical services and criminal justice. 18+ years' experience in fundraising, community engagement and leadership development. Strong relationship-building and strategic planning skills.

Sharon Greene – Director of Operations (start date August 2015)

Over 30 years' administrative experience, mainly in non-profit environments. Extensive background working with and assisting seniors in various capacities.

6. **Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.**

Cultivate Fix-It, Carry-Out Caravan and VetsGo programs are unique to Boulder County. Participants praise the programs for its ingenuity and ability to help them remain independent in their own homes. All of our

programs are provided free of charge to seniors in Louisville and throughout Boulder County. Carry-Out Caravan provides free grocery shopping and delivery service, essential to seniors who cannot access groceries and who cannot afford grocery delivery services. Our Fix-It program not only provides minor home repairs and basic assistance like changing smoke alarm batteries and hanging curtains, but installs grab bars wherever needed. The American Council of Older Adults states that grab bar installation is a "best practice" towards fall prevention around the home

Cultivate's VetsGo program is unique because it focuses on US military veterans and their senior family members. The volunteers not only drive older adults to their medical appointments but also stay with the client and offer emotional support before and after the appointment. Clients have reported that they would skip needed appointments and treatment if they had to use a bus or taxi because of mobility issues and costs. Clients have also reported that having a Cultivate volunteer with them gives them confidence and support. Cultivate also offers a unique VetsGo feature: we try to pair military veteran volunteers and clients for medical appointments at VA centers throughout the region. All program volunteers receive training and undergo background checks. Not only do volunteers provide concrete services but we also help alleviate isolation and provide support and peace of mind for seniors experiencing the challenges of aging.

Cultivate maintains strong relationships with other human service providers to address the needs of senior and avoid duplication of services. For example, we regularly swap materials with the three local Meals on Wheels to inform and refer other useful services to each other's clients. We collaborate with government entities, public safety officials, and numerous local organizations including Weld, Boulder and Broomfield Counties; the Cities of Boulder, Erie, Greeley, Longmont, Lafayette, Louisville, Lyons, Superior and Westminster; Boulder County and Weld County Area Agencies on Aging; the Boulder District Attorney; the Boulder County Sheriff's Department; the Longmont Police Department; the Longmont Fire Department; Broomfield Older Adult Team and the Boulder County Adult Protective Review Team. We have clients referred to us by APS Caseworkers, Law Enforcement Detectives and Age Well Centers to help assist seniors that need services beyond what these agencies can provide. Cultivate also collaborates with Folks in Aging, Interagency, Boulder County Latino Coalition, Broomfield Community Service Network and Westminster Community Service Network. We have strong relationships with area Veteran Organizations and VA facilities to support both senior veterans who can benefit from our VetsGo and other programs and with younger vets who wish to make a volunteer contribution. We also collaborate with local schools, congregations, community organizations and area businesses for community volunteering.

While outreach is an ongoing effort, we have continued to build and sustain relationships with organizations that serve Boulder, Broomfield, Weld and Larimer counties. These relationships include, but are not limited to, Qualified Listeners, Veteran's Community Project, Healing Warriors, Boulder County Veterans Services, University of Colorado Veterans Alumni Association, Broomfield County Veterans Services and Colorado Department of Labor Veterans Employment Specialists. Cultivate also participates in transportation initiatives across the Denver-metro region including the Boulder County Mobility for All, Broomfield County Local Coordinating Council and Denver Regional Mobility and Access Council.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

To note, Cultivate ended 2023 with a financial deficit for two reasons:

1. Cultivate expanded service delivery and operations into Weld County in July 2023, which resulted in expenses that were not budgeted for in January 2023.

2. Cultivate experienced significant funding cuts from several areas including the Area Agency on Aging (both programmatically and from ARPA funds) and from private foundations who receive more funding requests since the funding for aging services is shrinking.

Without the no-cost services that Cultivate offers, the community result will be devastating. Homelessness is already a growing issue facing Boulder County, and 12% of the unhoused are age 60 and older (BCAAA, 2024). Combined with the probability that 70% of those 65 and older will need long-term care, which averages \$144,175 per year in Boulder County (Genworth, Cost of Care Survey, 2024), the number of older adults that will become homeless is unfathomable because they are unable to remain living in their homes without no-cost support and they cannot afford long-term care. Further, studies show that each bathroom safety bar installed by a Cultivate volunteer avoids an estimated \$62,521 in medical costs that would result from a fall inside the home (National Library of Medicine, Cost of Inpatient Falls and Cost-Benefit Analysis of Implementation of an Evidence-Based Fall Prevention Program, 2023). The wide breadth of free services provided by Cultivate positively impacts our community by increasing the number of available resources. Cultivate services provide the support and safety older adults need to age in their own home while maintaining important social connections significantly reducing the need for increased support from social workers and healthcare providers.

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please list all funding sources anticipated for the 2025-2026 calendar year for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Federal Grants	\$ 170,964	30%
Foundations & Grants	\$ 100,000	18%
Private Donations	\$ 55,000	10%
Corporate Donations	\$ 5,000	1%
State & Local Governments	\$ 236,360	41%
		100%

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature



Chrysti R. Britt
Agency Director

303.443.1933 x 405
Telephone Number

crbritt@cultivate.ngo
E-Mail Address

Signature



Donna F. Mitchell
Immediate Past Board President

303-596-7215
Telephone Number

potterdoc@mac.com
E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.



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

BOULDER COUNTY RSVP BOARD INC
6325 GUNPARK DR STE F
BOULDER, CO 80301-3593

Date:
October 19, 2021
Employer ID number:
84-0769724
Form 990 required:
990, Yes
Person to contact:
Name: V Rackley
ID number: 0727576

Dear Sir or Madam:

We're responding to your request dated January 22, 2021, about your tax-exempt status.

We issued you a determination letter in December 1981, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax-deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period.

- Form 990, Return of Organization Exempt From Income Tax
- Form 990-EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely,

Stephen A. Martin

Stephen A. Martin

Director, Exempt Organizations Rulings and Agreements

Letter 4168 (Rev. 09-2020)
Catalog Number 66666G

137/251

CAHILL & ASSOCIATES PC
4810 RIVERBEND RD
BOULDER, CO 80301
(303) 440-0400
www.cahill-cpa.com

August 2, 2024

BOULDER COUNTY RSVP BOARD, INC.
dba CULTIVATE
6325 GUNPARK DRIVE, SUITE F
BOULDER, CO 80301-3593

Dear Client:

Your 2023 Federal Return of Organization Exempt from Income Tax will be electronically filed with the Internal Revenue Service upon receipt of a signed Form 8879-TE - IRS e-file Signature Authorization. No tax is payable with the filing of this return.

Please be sure to call us if you have any questions.

Sincerely,

Edward T. Cahill, CPA

Board of Directors

NAME/DUTIES	OCCUPATION/ YRS SERVED	ADDRESS/PHONE/EMAIL	AFFILIATIONS/SKILL SETS
GINGER ROBITAILLE Chair Term ends: 2025	Foundations Counseling, LLC Vice President of Operations On board since May 2021	1450 Serenity Cir Longmont, CO 80504 303-257-8828 gingergr06@gmail.com	Business Operations, HR and event planning
BETH AMORE Vice Chair Term ends: 2026	MidFirst Bank First Vice President On board since April 2023	840 Pearl St Unit 1 Boulder, CO 80302 303-376-3830 beth.amore@midfirst.com	Business development, marketing, and relationship management
NANCY CHIN-WAGNER Term ends: 2025	Nancy Chin-Wagner, LLC POWERCONNECTIONS On board since Sept 2015	2525 Arapahoe Ave Ste E4-130 Boulder, CO 80302 720-281-2997 nancy@nancychinwagner.com	Networking Maven Strategically working with small medium business owners who are introverts.
JENNIFER FULTON ANDERSON Treasurer Term ends: 2025	Financial Consultant On Board since Nov 2022	2545 Vine Pl Boulder, CO 80304 415-259-1467 jennifer.fulton@gmail.com	Financial & operational executive management; financial and investment analysis; governance; strategic planning; budgeting; human resources; fluent in Spanish.
LENA HEILMANN Term ends: 2024	Director, Colorado Office of Suicide Prevention, CDPHE On Board since Feb 2021	6841 Cheney Ct Niwot, CO 80503 303-746-9988 lenamqheilmann@gmail.com	Public health, suicide prevention, former board treasurer, public speaking and training
CAREY MASON Term end: 2025	Cornell Certified Diversity Specialist/TAB Certified Business Coach/Facilitator On board since July 2016	1035 Pearl St Ste 239 Boulder, CO 80302 720-587-9614 carey@dei4biz.com	Business Coaching & Consulting for small businesses, non-profits and struggling/fledgling entrepreneurs
DONNA MITCHELL, MD Immediate Past Chair Term ends: 2024	BodyPoint Medicine, LLC Integrative Pain Management Office On board since Sept 2017	5916 Ridgeline Pl NE Rio Rancho, NM 87144 303-596-7215 potterdoc@mac.com	Physician, small business owner, event planning, quality management/improvement, policy and procedures
KAREN PICKERING Secretary Term ends: 2025	Bolder Insurance Commercial Insurance Agent On Board since Feb 2016	453 Grouse Ct Louisville, CO 80027 303-263-1357 karen@bolderins.com	Actively engaged in numerous Chambers; skilled in fundraising, facilitation of events
ROBERT SCHAFFNER Term ends: 2025	Retired CPA/Volunteer On board since May 2014	1301 Canyon Unit 206 Boulder, CO 80302 303-953-9784 robertschaffner@yahoo.com	Planning, finance, development, cultivation of resources for nonprofits
REGIS QUINN Term ends: 2027	Retired Biopharmaceutical Representative/Volunteer On board since Mar 2024	7641 Monarch Rd Longmont, CO 80503 303-514-1975 niwotreg@gmail.com	Sales acumen, working together as a team, organizational skills, networking

Updated 3/2024

100% of Board Members contribute financially



GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization Community Food Share

Program Title or "General Operating" General Operating for Food Distribution Programs

Contact Person Title Terry S Mast **Title** Grants Administrator

Address 650 S Taylor Avenue, Louisville, Colorado 80027

Telephone 303-652-3663 **E-Mail** tmast@communityfoodshare.org

Program Duration (if applicable) Begin **End** (ongoing)

Anti-Discrimination Policy (Required) Yes ☒ No ☐ Other ☐

	2025	2026
Grant Amount Requested for 2025 and/or 2026	\$ 10,000	\$ 10,000

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. Organizational background: What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

Since 1981, Community Food Share's mission has been to end hunger in Boulder and Broomfield Counties. We empower people to achieve equitable access to nourishing food through the programs we and our partners offer. The strategic pillars we operate under are to FEED our neighbors by optimizing the distribution of nourishing food; to build COMMUNITY with our partners, donors, and community members to strengthen services; to SUSTAIN our participants and staff, as well as the environment, by efficiently sourcing safe, quality food; and to EDUCATE AND EVALUATE to ensure we are meeting our neighbors' needs and advocating for public policies that will create lasting change for the very common and very real issue of food insecurity.

In FY24, we distributed 13.1 million pounds of food through our two-county area through face-to-face pantry services and to our 43 agency partners, which provide direct human services in their neighborhoods. We host an in-house pantry and drive-up and walk-up pantry services off-site. CFS staff and volunteer drivers deliver nutritious food to seniors 60 and over in their homes. Much of the food we provide is sourced from retail partner donations, through food rescue, produce donations from local organic farms, and food procurement through federal nutrition programs and discount bulk opportunities. Last year, 84% of our food was donated.

The data that fuels our program operations is collected daily by our staff. We incorporate information from the database of Feeding America, the nation's leading domestic hunger-relief organization. Additionally, we utilize census data and population demographics for our area, indicators of household income and food insecurity, and economic trends that illustrate the challenges of bridging the budget gap between income and the ability to afford healthy food. In Boulder County, 41,320 neighbors are experiencing food insecurity (10.3% of the population). While this represents 1 in 10 people, the county also requires the fifth highest income in the state to support a family of four - a sobering contrast. The average meal costs up to \$5.06 in our area. Community Food Share exists for anyone within our two-county service area to ensure every neighbor has access to nutritious food.

2. Program description: What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

Community Food Share requests funding to support general operating costs for our overall food distribution programs. Of our total 13.1 million pounds of food distributed in FY24, 2.9 million pounds went to shoppers within Louisville's boundaries, either via our on-site pantry, Louisville-based agency partners, our mobile pantries, or through Blue Spruce Neighbors deliveries. Last year, we achieved our goal to distribute 75% of our food in the important nutrient categories of fresh produce, protein, and dairy. Our FY25 budget accounts for nearly \$2 million in food acquisition costs, above the 10-plus million pounds of food we expect to receive in donations from retail partners.

We are the only food bank and food distribution center serving our two-county region. CFS delivers food and provides a partner pantry area available to 43 service agencies in our network, which receive 68% of our distributed food.

In addition to our agency partner distributions, 32% of our food was distributed directly through our three pantry programs: Feeding Families, our on-site pantry providing 18 hours of shopping each week for once-per-week neighbor visits; Mobile Pantries that serve low-income neighborhoods Longmont, the City of Boulder, and Broomfield and operate twice per month for shopper access; and Blue Spruce Neighbors, our home delivery program for seniors, which also increases social connections through twice-monthly food drop-offs.

3. Program measurements: Provide the following information for the program/activities for which funding is requested:

Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

Our key service populations include families with children, seniors, and low-income individuals in Boulder County and Broomfield County, Colorado. In April, May, and June 2024, 300 additional households visited our on-site pantry, a 60% jump over that time last year. The need within these

vulnerable populations is rising. Our data shows that in FY24, 637 individual Louisville residents shopped at Feeding Families and about 21 shopped at one of our mobile pantry locations. Fifty-one Louisville residents are enrolled in the Blue Spruce program. In FY23, food distribution to the City of Louisville was over 2.5 million pounds.

Community Food Share and our agency partners serve participants of all ages from diverse races and cultural backgrounds. Of 17,958 total unduplicated individuals served in all our pantry programs over the past fiscal year, Louisville neighbors who self-reported their race or cultural identity included 41% White (includes Hispanic White), 38% Latinx/Hispanic, 6% Asian, 13% Multiracial, and 2% African American/Black. Women were 54% of those self-reporting, 44% were male, and 0.25% reported as gender non-conforming or transgender. In Fiscal Year 2024, our on-site pantry alone served 11,918 unduplicated individuals from 3,735 households. Within that total, the numbers of Louisville residents included 28% as children and 19% as seniors, and 53% as adults 18 to 59 years of age.

Qualitative measures: How will you measure the success of this program/activity?

We keep those we serve at the center of our work by providing many ways to solicit their feedback and lived expertise. Our research creates a measurement and evaluation feedback loop with community members from which we take information to key teams at CFS. Based on the data, we determine food procurement and distribution actions to take. Our Community Collaborations team hosts regular feedback sessions, for which we compensate our neighbors at \$25 per hour, and offer a text option to respond to brief survey questions after every visit. For our senior shoppers, we use a postcard response strategy.

Community members receive updates and further information about program changes through blog posts and texts. We always strive to communicate the “why” to our neighbors to respect their shared feedback.

We follow other proven methods of data collection, as well, such as Feeding America’s Client Survey, and the USDA food security screening questions. This fall we will move all program data collection into Feeding America’s SIMC software (Service Insights on Meal Connect) to better measure our overall community impact.

Success is evident when our neighbors know about our services and connect with us to meet their basic food needs. Barriers to healthy food will be reduced or eliminated and neighbors will be satisfied with the variety of nutritious food offered at sites convenient for them. Through our local collaborative agencies and partners, as well as our shoppers, we identify and address the issues keeping some populations from getting the nourishing food they need. Survey results will continue to reflect satisfaction and increased peace of mind.

4. Evaluation: If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

Our program enrollments continue to grow, which means our neighbors are finding us and getting the healthy foods that they need. However, as shopper numbers rise, CFS is challenged to continue meeting this growing need for food security. Our FY24 distribution of over 13.1 million pounds was our highest level to date. While that amount gives us satisfaction at one level, we understand that to maintain our services, we must creatively source additional funding and efficiently source food. The cost of living in Boulder County is a primary reason that a resource like Community Food Share is critical. Most of our families earn \$55,000 or less per year and face a monthly food budget of nearly \$1,120. Providing no-cost access to healthy foods year-round improves our neighbors' health and reduces stress by significantly offsetting their weekly food expenses. Research on the benefits of SNAP and TEFAP enrollment shows their significant benefit to nutrition food access, and we work diligently to enroll households on-site and at other Boulder County agencies.

Our FY25 budget reflects increasing costs with the increased need among neighbors experiencing hunger. We proactively set new philanthropic strategies to build even more collaborative partnerships with local companies as well as long-time grant funding agencies and local governments such as the City of Louisville's.

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

5. Leadership:

- **How many people serve on your Board of Directors and how many of these are Louisville residents?**

We have 13 members on our Board of Directors, none of whom currently live in Louisville. Members reside in the City of Boulder, Superior, Longmont, Lafayette, Niwot, Erie, and Broomfield.

- **How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?**

Community Food Share currently employs 48 employees. The full-time equivalent is 48.6, including one temporary worker at our organic farm.

One of our employees lives in Louisville.

- **Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.**

Volunteers meet CFS program staff at each of the mobile pantry locations and are on site at our warehouse to help with the continuous task of sorting food donations. They are available to shoppers to answer questions and to assist with food selection if needed. In FY24, we benefited from the help of 2,357 individual volunteers and their 26,657 hours of support for our services. That represents a value of \$969,249 and the equivalent of 13 full-time employees.

- **Who will be responsible for the administration of the program or service?**

Our programs for direct food distribution are ultimately administered by our Chief Operations Officer and Director of Operations under the leadership of our Chief Executive Officer and Board of Directors. Day-to-day management of food distribution is handled by our Manager for Offsite Programs, Pantry Supervisor, and Warehouse Manager.

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

We are the only food bank and food distribution center serving Boulder and Broomfield Counties. Within Boulder County, Community Food Share delivers food and provides a partner pantry area available to agencies on our 43-member partners list. Without the work of Community Food Share, our partner agencies would be further challenged to meet the needs of our community, impacting more than 30,000 neighbors. Through our work with agencies, we empowered our partners to serve over 240,135 visits in FY24, which represents 668,974 meals.

These 43 partners receive 68% of the food we distribute. This allows us to facilitate an even broader local approach, reduce barriers to food access through collaboration, and feed more neighbors who cannot access our services at the warehouse. In partnering with agencies, we expand our scope to serve nearly 48,000 county participants!

The Louisville Community Food Bank is one of these important partners. Community Food Share's Feeding Families pantry is just 2 miles from Louisville City Hall. Other nearby partners include the Sister Carmen Community Center, YMCA of Northern Colorado Boulder County, and Coal Creek Meals on Wheels.

With some of our partners, we collaborate in outreach and data-gathering projects to improve outreach and services to neighbors who live in low-income housing.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

It is CFS' mission to help our community arrive at the place where policies set the stage for food access and food security is commonplace for everyone in Louisville, and within Boulder and Broomfield Counties.

Not only do our neighbors express their gratitude for Community Food Share's services, but they also express hope for their circumstances to change over time:

"I am SO beyond thankful for your staff, volunteers and supply! This is the first time after a long time that I've had to go to a food bank, and I had so many emotions about it. What you are doing is LIFE CHANGING! I cannot wait to give back when I am able to. And my kids as well! You are showing the future generations that it's ok to struggle and seek help. That it's just a chapter. I appreciate your work more than you know. I really didn't know how I was going to manage this month. Thank you from the bottom of our hearts!"

"This organization has really changed the quality of my family's life for the better. I don't know what I would have done without them. I probably would have dropped out of school. Needing this kind of assistance is humbling, and the workers go out of their way to be friendly and kind; I've never felt judged or ashamed when I come here. Thank you for having this program. It's saved our lives and we are so grateful for all the help we've received here. Thank you."

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please list all funding sources anticipated for your **2025-2026 fiscal years** for the entire Program/agency.

<u>Source of Funding</u>	<u>Estimated/Requested Funding Amount</u>	<u>Percent of Total</u>
Individuals	\$2,930,000	39%
Corporations	\$450,000	6%
Associations	\$50,000	1%
Grants & Foundations	\$800,000	11%
Promotions	\$300,000	4%
Government Grants	\$450,000	6%
Special Events	\$238,000	3%
Government Contracts & Reimbursements	\$1,298,000	17%
Earned Revenue	\$138,500	2%
Net Assets Released	\$260,129	4%
CFS Reserve Funds	\$508,057	7%
Total	\$7,422,686	100%

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.



Signature, Agency Director

303-652-3663 x204

Telephone Number

Kdasilva@communityfoodshare.org

E-Mail Address



Signature, Board President

303-447-1375

Telephone Number

janderson@dietzedavis.com

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.



IRS Department of the Treasury
Internal Revenue Service

P.O. Box 2508, Room 4010
Cincinnati OH 45201

In reply refer to: 4077589886
Jan. 30, 2014 LTR 4168C 0
74-2227731 000000 00
00033410
BODC: TE

COMMUNITY FOOD SHARE INC
650 S TAYLOR AVE
LOUISVILLE CO 80027-3067



008209

Employer Identification Number: 74-2227731
Person to Contact: Mr. Schatz
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Nov. 12, 2013, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in June 1982.

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.

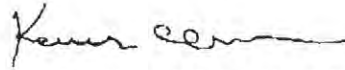
Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third 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.

4077589886
Jan. 30, 2014 LTR 4168C 0
74-2227731 000000 00
00033411

COMMUNITY FOOD SHARE INC
650 S TAYLOR AVE
LOUISVILLE CO 80027-3067

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



Kenneth Corbin, Acting Director
Exempt Organizations

CAHILL & ASSOCIATES PC
4810 RIVERBEND RD
BOULDER, CO 80301
(303) 440-0400
www.cahill-cpa.com

November 20, 2023

COMMUNITY FOOD SHARE INC.
650 S. TAYLOR AVENUE
LOUISVILLE, CO 80027

Dear Client:

Your 2022 Federal Return of Organization Exempt from Income Tax will be electronically filed with the Internal Revenue Service upon receipt of a signed Form 8879-TE - IRS e-file Signature Authorization. No tax is payable with the filing of this return.

Please be sure to call us if you have any questions.

Sincerely,

Edward T. Cahill, CPA



**BOARD OF DIRECTORS
FY 2025**

Executive Board Team:

Josh Anderson – Board Chair

Executive, Governance, Nominating Committees
Dietz and Davis, Partner
Broomfield, Colorado
Term end date: June 28, 2026

Susan Boyle – Board Vice Chair

Executive, Governance, Marketing, Nominating Committees
Boulder Country Day School, Chief Enrollment and Strategy
Officer
Boulder, Colorado
Term end date: January 24, 2028

Alex Cloth – Board Secretary and Treasurer

Executive, Finance, Operations & Collaborations Committees
Claremont Foods LLC, Founder & CEO
Superior, Colorado
Term end date: March 28, 2028

Board Members:

Debbie Hodge

Finance, HR, Marketing Events (Ad Hoc) Committees
Mile High 360, Finance Manager
Lafayette, Colorado
Term end date: January 28, 2025

John Klein

Finance, Compensation (Ad Hoc), Operations & Collaborations
Committees
Medtronic, Chief Procurement Officer
Niwot, Colorado
Term end date: July 26, 2026

Jonathan Sackheim

Marketing Committee
Grounds for Promotion, Founder & General Manager
Boulder, Colorado
Term end date: August 24, 2026

Gladys Boza

IT (Ad Hoc), Nominating Committees
Trimble Advanced Positioning Division, Business Systems
Manager
Longmont, Colorado
Term end date: March 22, 2027

Jennifer Stepanich

HR, Compensation (Ad Hoc) Committees
Medtronic, Sr. HR Director
Erie, Colorado
Term end date: March 22, 2027

Joanie Tanous

IT (Ad Hoc) Committee
Oracle Corporation, Senior Program Manager
Boulder, Colorado
Term end date: January 24, 2028

Bryce Schonberger

Finance, Compensation (Ad Hoc) Committees
University of Colorado Boulder, Assistant Professor of
Accounting
Broomfield, Colorado
Term end date: October 22, 2029

David Kinney

Finance, Marketing Events (Ad Hoc) Committees
Flatirons Bank, Chief Banking Officer
Lafayette, Colorado
Term end date: October 22, 2029

Martin Osborn

Marketing Committee
Becton-Dickinson, Senior Director, Commercial Excellence
Erie, Colorado
Term end date: October 22, 2029

Joseph Ryan

Governance, IT (Ad Hoc), Operations & Collaborations
Committees
EDUCAUSE, Vice President and Chief Information Officer
Lafayette, Colorado
Term end date: January 21, 2030

2023

ANNUAL REPORT



community[®]
FOOD SHARE

Fighting Hunger in Boulder & Broomfield Counties

www.communityfoodshare.org

154/251

We distribute **OVER 27,000 MEALS EACH DAY** through our network of 42 Partner Agencies and our onsite and mobile pantries.



That's enough meals to feed everyone in a sold-out Red Rocks Amphitheater **THREE MEALS A DAY.**

A Message of Gratitude to OUR COMMUNITY

In Boulder and Broomfield Counties, a family of four needs to earn an annual income of at least \$100,000 to make ends meet without public or private assistance. Most families served by Community Food Share's network earn an annual income of \$55,500 or less. This leads to hunger affecting 1 in 12 individuals in Boulder and Broomfield Counties.

As long as the need for food security remains, so will our mission to nourish our neighbors.

This annual report is not just a compilation of statistics; it is a testament to our shared mission and the strides we've taken collectively to address the pressing issue of hunger in our community.

It's thanks to the support of our amazing community members that we were able to serve more than 50,000 individuals throughout our two county radius this past year.

In FY23 we were able to distribute
11.7 Million Pounds of Food
Providing
9.75 Million Meals
and Rescuing
12 Tons of Food Each Day

155/251

MEAL Distribution

Community Food Share proudly collaborates with over 40 organizations to extend a helping hand to our neighbors in Boulder and Broomfield counties. These strategic partnerships constitute our hunger relief network and play an instrumental role in our mission as they total a remarkable 68% —equivalent to 8.0 million pounds—of the total food distributed by Community Food Share.

Beyond the 8.0 million pounds, the depth of our community engagement is evident in the 212,203 food pantry visits facilitated by our Partner Agencies. Moreover, the impact extends to the quality of meals provided, striving for 70% of food to be either fresh produce, protein or dairy items. This holistic approach reflects our commitment to not only alleviating immediate hunger but also fostering a community where nutritious options are readily available.

5.70%

Non-Food

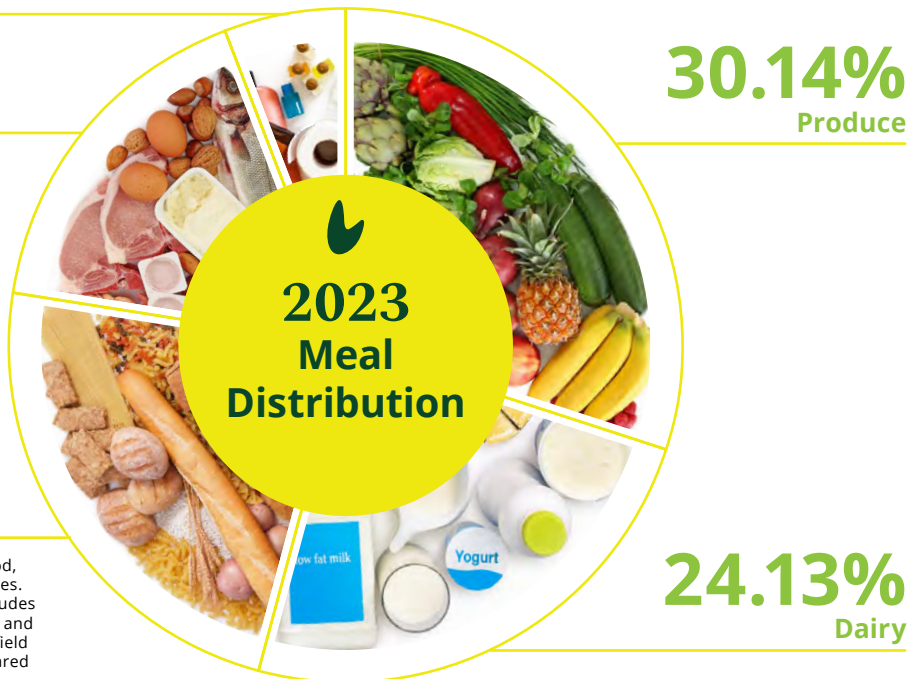
16.79%

Protein

23.23%

Other Food*

* "Other Food" includes unsorted food, bread, desserts, snacks, and beverages. Please note that this distribution includes food that is distributed to individuals and organizations in Boulder and Broomfield counties. It does not include food shared with other food banks or spoilage.



Partner Agencies accounted for approximately **6.7 MILLION MEALS** valued at an impressive \$15.4 million.



PROGRAM Success

	Feeding Families	Mobile Pantries	Elder Share
Visits & Food Deliveries	29,512	14,578	6,886
Pounds Distributed	2,473,013	640,639	238,657
Households/ Families served	2,606	1,163	568
Individuals served	7,792	2,745	591

Internal programs account for
3.4 MILLION POUNDS or
28% of total distribution.



7,792
individuals

Feeding Families

Feeding Families is Community Food Share's onsite pantry in Louisville, which offers a choice pantry model allowing individuals and families to select fresh produce, milk, grains, and essentials weekly. **In the past year, 2,473,013 pounds of food were distributed through the program.**



2,745
individuals

Mobile Pantries

Community Food Share addresses barriers to access by bringing mobile pantries to neighborhoods in Boulder and Broomfield Counties. These "pantries on wheels" deliver fresh produce, dairy, meat, and more. This initiative aims to reach individuals facing transportation challenges, medical disabilities, or other barriers. **In the past year, the mobile pantries program was visited 14,578 times by 2,745 individuals.**



591
individuals

Elder Share Program

The Elder Share program by Community Food Share offers bi-monthly free groceries to low-income older adults 60+. Volunteers deliver directly homebound individuals along with bi-weekly pantries in older adult communities. The groceries include fresh produce, milk, meat, frozen items, eggs, bread, and pantry staples. **In the past year, 568 households recieved groceries through the program.**

Our volunteers collectively
INVESTED 24,226 HOURS.

That's equivalent to the
commitment of
12 full-time employees.

Comprising an impressive 25% of all hours worked
within our organization.

2,326

**Unique
Volunteers**

COMMUNITY LED.
Community Fed.

The collaboration of our community
extends beyond numerical measures,
embracing the invaluable contributions of
our dedicated volunteers.

The immeasurable value of their time is
reflected in a staggering contribution exceeding
\$832,000,. This underscores the extraordinary
impact our Community makes in supporting our
mission.

With a total of 2,326 unique individuals
generously offering their time, our volunteer
force embodies the heart and soul of
Community Food Share.

Statement of FINANCIAL ACTIVITY

SUPPORT & REVENUE

Contributions	\$3,826,516
Grants	\$1,522,171
Events	\$268,669
Investment Income	\$211,309
Food Donations	\$22,037,115
Total	\$27,865,780

EXPENSES

Program Services	\$4,882,498
Fundraising	\$938,088
Administration	\$762,055
Cash Subtotal	\$6,582,641
Non-Cash Expenses	\$22,401,100
Total	\$28,983,741

Change in net assets: (\$539,458) | **Ending Net Assets: \$15,904,595**

Board of DIRECTORS

Debbie Hodge
Board Chair
Josh Anderson
Board Vice Chair
Barbara Keiger
Board Secretary and
Treasurer

John Klein
Jonathan Sackheim
Erinn Darby
Gladys Boza
Jennifer Stepanich
Joanie Tanous

Susan Boyle
Alex Cloth
Bryce Schonberger
David Kinney
Martin Osborn

2023 Notable ACHIEVEMENTS

In FY23 we finalized and launched a new three-year strategic refresh. The refresh is built around four key pillars: Feeding People, Community, Sustainability, Education, and Evaluation.

This past year saw unprecedented demand for our services. New monthly records were broken for new enrollments, individuals served, and families served.



community[®]
FOOD SHARE

www.communityfoodshare.org

160/251

<https://www.louisvilleco.gov/home/showdocument?id=42603&t=638569937515046082>



GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided.

Applicants

should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in

case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization: Developmental Disabilities Center, dba Imagine!

Program Title or General Operating: General Operating

Contact Person: Jennifer Meredith Title: Grant Writer

Address: 1400 Dixon Avenue Lafayette, CO 80026

Telephone: 303-926-6460 Email: jmeredith@imaginecolorado.org

Program Duration: Begin: 7/1/2024 End: 6/30/2025 is our Fiscal Year.

Anti-Discrimination Policy Yes X No

Grant Amount Requested for **2025 and/or 2026**

2025	2026
\$10,000	\$10,000

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. Organizational background: What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

The mission of Imagine! is to create a world of opportunity for all abilities. Imagine!'s guiding philosophy is that all individuals, regardless of ability or disability, have talents and strengths that make them vital members of their communities. For over 60 years, Imagine! has created and offered innovative supports to people of all ages with cognitive, developmental, physical, and health-related needs so that they may live fulfilling lives of independence and quality in their homes and communities. Imagine! was established in 1963 as a not-for-profit 501(c)(3) organization providing supports and services for individuals with intellectual and developmental disabilities (IDD) – disabilities that stem from cognitive and/or neurological impairment and may manifest in combination with a physical disability or other health related needs. The first community-initiated provider of services to this population in Colorado, Imagine! was founded by a group of parents who wanted their children with intellectual and developmental disabilities to have the same opportunities as other children in their community.

Imagine!'s strategic goals include:

- Continue legacy of innovative, transformative, and diverse services that nurture the potential of individuals of all abilities.
- Purposely invest in the workforce to ensure it is effective, efficient, and successful.
- Inspire public support and influence policy by raising mission awareness.
- Deepen our impact through capacity building.

Imagine! collaborated with Boulder County in its Community Needs Assessment for people with Intellectual and Developmental Disabilities by providing our expertise as a former Community Centered Board and largest Provider Agency in Boulder County. There were six "Priority Needs" identified by stakeholders and all but one ("Systems Navigation, Case Management, and Advocacy") - can and is being addressed by Imagine!. Imagine!'s programs provide the opportunities for individuals with IDD to experience and be involved with Housing, Mental Health, Self-Advocacy, Engagement, Social Connectedness, Community Education, and IDD Awareness.

2. Program description: What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

Imagine! respectfully requests funds for general operating support.

Imagine! welcomes individuals with intellectual and developmental disabilities into service irrespective of the type or severity of their IDD. Our person centered community based services include job training and placement, educational and therapeutic adult and school age service

programs, mental and behavioral health services, nursing services, representative-payee services, embedded assistive technology services, and a range of residential services.

Specifically, Imagine!'s School Age Service (SAS) program makes a positive difference in the lives of children/adolescents and their families through high-quality, therapeutic, community-based services. Our team of Certified Therapeutic Recreation Specialists develops and runs programming that goes well beyond basic respite or childcare by supporting the individual. SAS programming builds opportunities for learning, socialization and community inclusion through activity interventions and positive instruction.

Imagine!'s Adult Community Services program provides a variety of classes and community engagement activities. The activities are designed by Imagine! staff with the help of our Therapeutic Recreation team to improve upon social skills, motor skills, communication skills, and independence through interventions and positive instruction on the subject matter at hand. These outings increase safe access to community, reduce isolation, promote overall health, and diminish the risk of depression and other health problems associated with individuals with disabilities.

For most adults, work is a central experience in their daily lives. It provides financial security and independence, gives a sense of purpose and accomplishment, and is a primary source for camaraderie. Despite the importance of work as a social determinant of health, 85% of people with an IDD do not have a paid job in the community. (National Core Indicators). Imagine! helps create job equity for individuals with IDD so they may access fair paying and meaningful work in the community. Our team also provides training on disability awareness and strategies to increase diversity and inclusion in the workplace.

Imagine!'s team of Mental and Behavioral Health clinicians provide psychiatric, therapeutic, and behavioral health services for individuals with IDD. Imagine!'s clinicians have the expertise to assist individuals with a dual diagnosis of IDD and mental health disorder. Imagine!'s Behavioral Health Services program provides behavioral assessment, behavioral plans, and line staff support to individuals with behaviors that limit their ability to succeed at home, work or in the community.

Imagine!'s Residential Services program matches individuals with IDD to a living situation that caters to their unique needs and interests in an environment where the individual feels safe, supported, and empowered. Imagine!'s housing options include companion home or host home placement, supervised group homes, and limited supervision in one's own apartment. Our direct support providers plan community based activities for our residents.

Imagine! also provides embedded nursing and assistive technology support for all our clients to empower them to live their most healthy and independent lives possible.

3. Program measurements: Provide the following information for the program/activities for which funding is requested: Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

Imagine!'s anticipates over 650 unduplicated individuals with intellectual and developmental disabilities to be served in FY25 ranging in age from 3 to 79. We anticipate thirty-three City of Louisville residents. The racial and ethnic demographics of our clients and that of Imagine!'s staff mirror that of the counties we serve with approximately 20% of clients identifying as BIPOC. The gender breakdown is 63% male, 36% female and 1% non-binary, which reflects the nationwide trend that IDD is more prevalent in males than females. Over 95% of our clients qualify as extremely low income and are on a Medicaid Waiver.

Qualitative measures: How will you measure the success of this program/activity?

Imagine! employs various methods to determine and measure program outputs and outcomes. Satisfaction, quality, and individual progress towards goals as defined by individuals receiving support are the main themes within the various programs. Annually, Imagine! sends out a client survey that seeks feedback on how services or funds were used, progress towards goals, satisfaction with direct care staff, opportunities to access the community, and what changes one might like to see with services and supports. We then modify or create programs based upon this information. In addition, certain programs track clients' progress toward achieving goals through targeted surveys or Assessment of Functional Living Skills (AFLS). For instance, our Employment Services Job Development program uses pre- and post-program surveys measuring client knowledge, confidence levels and skill sets learned in the job search process. Our Certified Benefits Counseling/Planning program will also use targeted surveys to measure pre- and post-session knowledge levels and confidence levels for making decisions on how employment interacts with public benefits. To determine how we can help a client live more independently our Board Certified Behavior Analysts utilize the AFLS assessment. We assess a client when they first move into an Independent Living environment to create a plan and after 12 months we assess again to look for an improvement in Independent Living skills.

4. Evaluation: If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

As of July 1, 2024, the State of Colorado enacted Case Management Redesign. This law split Imagine! into two companies, one that is focused on Case Management/Community Centered Board functions, and another company which will be a Provider Agency (or Program Approved Service Agency) under the State of Colorado guidelines. It is the later arm, the Provider Agency, retained the name Imagine! and that is applying for this grant. The services provided by the Provider Agency are detailed above. As we are no longer synonymous with Case Management, Imagine! will have to focus on marketing its Provider Agency strengths. As well, Imagine! will see some pressures on the budget given an expected reduction in donations and County

funding year-over-year. However, Imagine! is embracing this opportunity to improve existing services and expand services so that we can be, once again, the premier provider of services to individuals with IDD in our area. For instance, we applied for and received a grant from HCPF ARPA funding to receive one-on-one, in the field, mentorship training from the Colorado Office of Employment First for our Employment Services Job Coaches so that they can be the best in class in the competitive, integrated employment model. As well, Imagine! received funding to open a one-of-a-kind in Colorado Mental and Behavioral Health clinic. This interdisciplinary clinician driven model will serve the most challenging of youth, adolescents and adults experiencing mental health or behavioral issues in combination with IDD, brain injury, or autism. Imagine! will continue in its unwavering commitment to the mission.

5. Leadership:

How many people serve on your Board of Directors and how many of these are Louisville residents?

There are seven members on the Imagine! Board of Directors and two of them are Louisville residents.

How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

In FY24 Imagine! employed approximately 400 employees and the full-time equivalent would be 238 individuals.

In FY24 there were 17 employees that are Louisville residents.

Does your organization utilize volunteers? If yes provide a brief description of their role and approximate number of volunteer hours donated in a year.

Imagine! is rebuilding its volunteer program to track numbers of volunteers and hours served. We have volunteers who wash our fleet vehicles, gather to do outdoor clean ups of our group, host and companion homes. We have also had volunteers who help with meal preparation in our group homes. In FY24 we had approximately sixty volunteers who each donated 3 hours of service for a total of 180 hours of service. As Imagine! settles into its identity of an independent provider agency we look forward to creating a sustainable, consistent volunteer program.

Who will be responsible for the administration of the program or service?

Jodi Walters is the CEO and Stephen Shaughnessy is the Director of Services. They lead a team of highly qualified Program Managers, Supervisors, Nurses, Technology gurus, Board Certified Behavioral Analysts, Certified Recreational Therapists, and dedicated Direct Support Providers.

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

Imagine!'s partner organization, the Association for Community Living (ACL) and many organizations in the community (e.g., the Sister Carmen Center, O.U.R. Center or local churches), recognize this need and offer resources to low-income individuals in crisis situations. However, these resources are heavily utilized by community members who are not diagnosed with a cognitive disability or are not among Imagine!'s service population. The scope and availability of these resources are unable to meet the needs of our very vulnerable population. Additionally, the State and Medicaid waiver services for Imagine! clients does not include housing. Because this is a state-wide challenge, Imagine! is working with Alliance, a Colorado association dedicated to strengthening community services and supports for people with intellectual and developmental disabilities by collaboratively advancing innovative policies and practices.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

Most of Imagine!'s revenue is from Medicaid which prescribes what is reimbursed and at what level. Funding of \$10,000 is requested to help fill the gap of non-funded costs so that we can provide consistent, high-quality services and go beyond a "one size fits all" approach. Some of these costs include:

- Safe and appropriate transportation to and from community based activities to include the maintenance, fuel, oil, modification, and licensure of vehicles.
- Certified Therapeutic Recreational Specialists, who design and run many of our adult and school age activities to ensure their therapeutic integrity.
- Adaptive equipment (e.g., on-the-go vestibular swings or lifts) and assistive technology (e.g., Augmentative Alternative Communication, switches, Virtual Reality technology for job and life skills training).
- Community integration costs and private pay events for participants unable to afford access to community resources (e.g., rec passes, class fees).
- Time spent by our job development team engaging and educating potential employers on the benefits of inclusion in the workplace and creating business partnerships.
- Time spent preparing for job development or coaching sessions.
- Time spent attending job fairs, Chamber of Commerce events, high school transition programs, resource, and community events.

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

*Federal and State revenue as result of program service fees

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Federal	\$20,369,690	80%
State	\$258,690	1%
Boulder County Gov't	\$2,529,481	10%
Other Gov't	\$70,202	0.3%
Foundations	\$705,441	2.7%
Investment Income	\$320,000	1.1%
Other Revenue	\$1,257,010	4.9%
Total Agency Revenue	\$25,510,514	

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature:		Signature:
X DocuSigned by: Jodi Walters 8/23/2024 66435101B6CF4B2...		X DocuSigned by: Heidi Storz 8/23/2024 2230E1177A004B3...
Agency CEO, Jodi Walters		Board President, Heidi Storz
303-926-6458		720-898-9680
jwalters@imaginecolorado.org		hstorz@imaginecolorado.org



Department of the Treasury
Internal Revenue Service

P.O. Box 2508, Room 4010
Cincinnati OH 45201

In reply refer to: 4077556751
June 05, 2014 LTR 4168C 0
84-0526620 000000 00

00040434
BODC: TE

DEVELOPMENTAL DISABILITIES CENTER
IMAGINE
% DEVELOPMENTAL DISABILITIES CENTER
1400 DIXON AVE
LAFAYETTE CO 80026-2790

Employer Identification Number: 84-0526620
Person to Contact: Ms Cunningham
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Feb. 20, 2014, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in November 1969.

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.

OGDEN UT 84201-0029

In reply refer to: 4077550286
Oct. 30, 2014 LTR 4168C 0
84-1540910 000000 00
00028478
BODC: TE

IMAGINE FOUNDATION
% IMAGINE
1400 DIXON AVE
LAFAYETTE CO 80026-2790

Employer Identification Number: 84-1540910
Person to Contact: MS SINGLETON
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your July 21, 2014, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in NOVEMBER 2000.

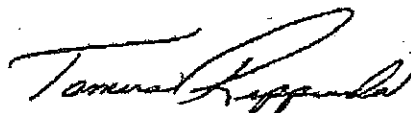
Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(3).

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.

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

169/251



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

Date **APR 22 2020**

IMAGINE FOUNDATION
1400 DIXON AVE
LAFAYETTE CO 80026

Employer ID number:
84-1540910
Person to contact / ID number:
Olga Foote
ID# 2965580
Contact telephone number:
1-877-829-5500
Form 990/990-EZ/990-N required:
Yes

Dear Applicant:

In your letter dated March 3, 2020, you requested reclassification of foundation status as a public charity.

Our records indicate you are tax exempt under IRC Section 501(c)(3). You're currently classified as a public charity described in IRC Sections 509(a)(3).

Based on the information you provided, we determined you meet the requirements for classification as a public charity described in IRC Sections 509(a)(3). and updated our records. Specifically, we determined you're a Type I supporting organization under IRC Section 509(a)(3). A Type I supporting organization is operated, supervised, or controlled by one or more publicly supported organizations.

Because your tax-exempt status wasn't under consideration, you continue to be classified as an organization exempt from federal income tax under IRC Section 501(c)(3).

This letter could help resolve questions on your foundation status. Keep it for your records.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Developmental Disabilities Center dba Imagine!								
Name	Position	Occupation	Employer	City of Residence	Years of Service as of 3/1/2024	Term End Date	Term Start Date	County
Marie Anne Gambon	Recruitment Committee, Services Committee	Founder	Gambon Enterprises	Louisville	4.2	5/1/2028	5/1/2020	Boulder
Don Peden Brown, Jr.	Past President, Executive Committee	Founder, Retired	Optimal Blue Secondary Svcs.	Louisville	4.2	5/1/2028	5/1/2020	Boulder
Heidi Ella Storz	President, Executive Committee, Services Committee	Attorney	Kerrane Storz, P.C.	Niwot	1.1	6/1/2031	6/1/2023	Boulder
Walt Finley Pounds	Services Committee, Finance Committee	Manager	Self-Employed	Boulder	5.2	4/30/2027	4/30/2019	Boulder
Rebecca J. Rose	President Elect, Recruitment Committee, Executive Committee	President	In Clover Research	Boulder	4.2	5/1/2028	5/1/2020	Boulder
Laura Antoinette Moore	Secretary, Executive Committee	Program Manager & Faculty Lecturer; Owner	CU Boulder; Silk by Laura, LLC	Denver	0.5	1/1/2032	1/1/2024	Denver
Anthony Joseph Verducci	Treasurer, Executive Committee, Finance Committee	Founder and CEO	Wayfinder	Denver	0.5	1/1/2032	1/1/2024	Denver
Imagine! Foundation								
Name	Position	Occupation	Employer	City of Residence	Years of Service	Term End Date	Term Start Date	County
Jessie Thompson	President	Branch Manager	Allied Mortgage Group	Lafayette	4.1	6/30/2027	6/30/2020	Boulder
Dale Charles	Treasurer	Director of Business Development	Applied Adhesives	Longmont	2.1	6/30/2025	6/30/2022	Weld
Joshua Putterman	Member	CEO	Extreme Event Risk	Lafayette	1.1	6/30/2026	6/30/2023	Boulder
Zoe Polk	Vice President, Celebration Chair	Business Manager	Pedestrian Shops	Denver	6.1	6/30/2024	6/30/2018	Denver
Brad Bickham	Member	Director of Investment	Colorado Financial Management	Boulder	4.1	6/30/2024	6/30/2020	Boulder
Andrew Christie	Member	Private Wealth Advisor	Heckman Financial	Longmont	1.1	6/30/2026	6/30/2023	Boulder
Brian Berry	Member	Director of Merchant Services	High Plains Bank	Longmont	1.1	6/30/2026	6/30/2023	Boulder
Charlie Davis	Member	Primary Consultant, MA	Co-Responder Consulting	Boulder	0.8	10/1/2026	10/1/2023	Boulder
Adam Monette	Member	Owner	Flagstaff House Restaurant	Niwot	0.1	6/1/2027	6/1/2024	Boulder
Makayla Quinonez	Secretary	Retail Manager	First Interstate Bank, Lafayette	Erie	0.1	6/1/2027	6/1/2024	Weld
Dr. Amanda Cadran	Member	Program Director	Instructure	Thornton	0.1	6/1/2027	6/1/2024	Adams



Key Staff

Jodi Walters, Chief Executive Officer, Imagine!: Jodi returned to Imagine! as the CEO in May of 2024 after nine years leading Parker Personal Care Homes. She worked with Imagine! for nearly 20 years before joining PPCH. Jodi has served on several commissions and boards including the executive board of Fostering Colorado, the President of the Board of the former local Part C entity for Boulder and Broomfield counties, and the Human Services Advisory Council for the City and County of Broomfield. She currently is the ANCOR Board of Representatives for Colorado and serves on the Board of Directors for Alliance as the current secretary and Past President in addition to serving as the federal chair on Government Relations for Alliance. Jodi has been working with children and adults with intellectual and developmental disabilities since 1993. She began her career by teaching blind and disabled school children in Taiwan. Jodi is most excited by developing innovative services to address needs, and creating policies or rules that help make the system more accessible for individuals and families. Jodi's connection to Imagine! goes beyond her early career. Her daughter was a client of Imagine!'s Early Intervention services and has experienced the pivotal impact that Imagine! has on individuals and families. In her free time, she loves hiking and biking with her family.

David Grimsland, Executive Director, Imagine! Foundation: David joined Imagine! in May 2023. Prior to the Imagine! Foundation, Dave directed the Colorado Grants Guide for the Community Resource Center in Denver, helping nonprofits of all sizes access funding throughout Colorado. Prior to that, he worked with Bright by Text, a nonprofit that delivers parenting tips via SMS technology nationwide designed to improve early childhood outcomes and family engagement. Dave has also served as the Director of Sales & Marketing for Boulder Weekly and Retail Advertising Manager for the Daily Camera, in Boulder. Dave has been a volunteer/board member for the Autism Society of Boulder County for over 15 years and have held the positions of Fundraising Chair and Vice President.

Robin Grey, Chief Financial Officer, Chief Operations Officer: Robin Grey has been the Chief Financial Officer for Imagine! since Feb. 2020. She has more than 25 years of financial and managerial experience in the cable, wireless, telecommunications, manufacturing and non-profit sectors. Prior to joining Imagine!, she was CFO for Fallbrook Technologies where she managed the accounting, treasury, budget, tax and financing functions for the company. Prior to that, she was SVP, Strategic Asset Investment Group and Treasurer of Level 3 Communications (acquired by Centurylink). Robin has a Bachelor of Science, Finance and MBA from University of Colorado.

Stephen Shaughnessy, Chief Services Officer: Stephen joined Imagine! in March of 2023. Stephen has worked in and provided leadership in the field of I/DD supports and services in both Kansas and Colorado since 2005. Most recently, Stephen spent five years as Director of Life Skills & Support and Homes for All Veterans at Rocky Mountain Human Services, and prior to that as Executive Director for a

PASA serving the Denver metro area. A passionate advocate for individual's rights and full inclusion, Stephen worked to partner with USD 259 in Sedgwick County KS to create a Project SEARCH site and to pilot an Employment First collaborative project in Kansas. He was a founding member of the Kansas Association of People Supporting Employment First (KS-ASPE), and a 2019 graduate of the National Leadership Consortium on Developmental Disabilities. Stephen holds a Master's of Public Administration with an emphasis in nonprofit management.

Cara Rodriguez, Manager of Public Relations and Communications: Cara Rodriguez earned her degree from the University of Vermont in 2016 and has worked on developing her skills in communications, digital design, social media marketing, and video editing since 2014. She has worked at a variety of nonprofits, with focuses ranging from scholarship support for indigenous students to food insecurity. At Imagine!, she started out as the PR Coordinator in 2019 and became the Manager of Public Relations and Communications in July of 2024. Cara helps support other nonprofits with their communications and design on her free time.

Consolidated Financial Statements and
Independent Auditor's Report

**Developmental Disabilities Center d.b.a. Imagine!
and Affiliates**

June 30, 2023

TABLE OF CONTENTS

	<u>Page</u>
INDEPENDENT AUDITOR'S REPORT	3
CONSOLIDATED FINANCIAL STATEMENTS	
CONSOLIDATED STATEMENT OF FINANCIAL POSITION	6
CONSOLIDATED STATEMENT OF ACTIVITIES	7
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES	8
CONSOLIDATED STATEMENT OF CASH FLOWS	10
NOTES TO CONSOLIDATED FINANCIAL STATEMENTS	11



INDEPENDENT AUDITOR'S REPORT

Board of Directors
Developmental Disabilities Center d.b.a. Imagine!

Opinion

We have audited the accompanying consolidated financial statements of Developmental Disabilities Center d.b.a. Imagine! and Affiliates (Imagine!), which comprise the consolidated statement of financial position as of June 30, 2023, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of Imagine! as of June 30, 2023, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis of Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Imagine! and to meet our other ethical responsibilities in accordance with the relevant ethical requirements related to our audit. We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Imagine!'s ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements, including omissions, are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Imagine!'s internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Imagine!'s ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Report on Summarized Comparative Information

We have previously audited Imagine!'s 2022 consolidated financial statements, and our report dated December 21, 2022, expressed an unmodified opinion on those audited financial statements. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2022, is consistent, in all material respects, with the audited financial statements from which it has been derived.

Logan, Thomas & Johnson, LLC

Broomfield, Colorado
January 30, 2024

GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization	<u>Intercambio de Comunidades DBA Intercambio Uniting Communities</u>		
Program Title or "General Operating"	<u>Adult English Classes for Louisville Residents</u>		
Contact Person	<u>Lucia Duran-Hernandez</u>	Title	<u>Grants Manager</u>
Address	<u>4735 Walnut Street Ste. B Boulder, CO 80301</u>		
Telephone	<u>(303) 996-0275</u>	E-Mail	<u>grants@intercambio.org</u>
Program Duration (if applicable)	Begin <u>1/1/2025</u>	End	<u>12/31/2026</u>
Anti-Discrimination Policy (Required)	Yes ☒	No ☐	Other ☐
		2025	2026
Grant Amount Requested for 2025 and/or 2026	\$ <u>1.500</u>	\$	<u>1.500</u>

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. **Organizational background:** What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

Intercambio's **mission** is to bring English learners and community volunteers together in language classes and gatherings to build skills, confidence, and life-changing connections. Since 2001, we have served over 15,000 **low-income adult immigrants** with difficulties to communicate in English in Louisville, CO, and the U.S.

We hold 6-level English and citizenship-preparation classes twice a week in our classrooms in Boulder and Longmont, as well as in in-kind locations from local organizations in Lafayette and, if we close our potential partnerships, soon in Louisville and Broomfield. To accommodate the family and work limitations of our students, we offer online, in-person, one-on-one and group classes.

Our model encourages communities to engage in **reciprocal learning**, transforming the lives of both teachers and students. This helps **break down language and culture barriers** and **promotes equity and inclusion in our community**. Uniquely, Intercambio is one of the very few organizations that publishes its proprietary curriculum, includes and trains its own corps of volunteer teachers, and offers extremely **competitive fees** for students, often providing scholarships when needed.

Our approach is **conversational-based and human-centered**, enabling our students to increase their speaking **confidence and self-sufficiency** in their day-to-day activities, their jobs, and in institutional settings such as the doctor office or school meetings for their children.

Our staff is **representative of the population we serve** (62% have lived immigrant experience). Furthermore, all but one of our English Program staff were once Intercambio students. Our staff, as Cultural Brokers, possess exceptional skills in navigating cultural diversity and fostering inclusive communication, leading to consistent excellent feedback from the 50 different nationalities of students and teachers we work with.

Our teachers are **community volunteers** who choose to increase their awareness of the talents and challenges of immigrants in Colorado and are eager to give back to the communities they live in. This approach is designed to bridge the differences between native-born Americans and immigrant residents, dismantling barriers of prejudice and isolation.

As part of our **outreach strategy**, we make and receive referrals to and from local nonprofits, governments and foundations that teach English to immigrant kids, advance adult formal education, and provide housing and human services. Our biggest referral source is word of mouth, where our students share their experiences with potential students. This demonstrates that they trust and rely on Intercambio to meet their language and community needs.

Intercambio regularly attends training courses, partners with local organizations and surveys our participants to **assess the needs of our community**. The **yearly increased demand** of adult immigrants wanting to take classes with us shows us a consistent need for our services. Higher English proficiency is linked to higher incomes, more educational opportunities for immigrants, and social integration. Our evaluations show that Intercambio helps them with community, education and work goals. 93% of our students not only feel **more welcomed in Colorado**, but they also **highly improve their English skills** and access **higher incomes**, earning an average of \$3 more per hour after taking classes. As stated by our student Gaby, *"I was a detective in Mexico for 5 years. Recently, I had an interview at the police department in Longmont. The interview was a success,*

because I could answer and understand all questions they asked.”

2. **Program description:** What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization’s activities.

Intercambio is requesting funding for our English Programs directed to a total of 20 Louisville residents per year. This Program is divided into **2 activities**:

Activity 1:

- Host **group** English Classes **online and in-person to 13 adult-immigrants Louisville residents** (per year). Group classes will be taught by community **volunteers**.
- **Location:** Group classes are held in our Boulder and Longmont facilities and possibly a space in Louisville from a partnered organization.
- **Timeline:** Group classes are held all year with term start dates in January, April, July, and October (2025). Every term has a duration of nine weeks. Classes meet twice per week, two hours per session.
- **Levels:** Group classes will cover levels Intro through Level 6 (advance), depending on demand. Usually, level Intro is the most demanded.
- **Curriculum:** We will use our proprietary materials, *Confidence and Connections*, consisting of two books per level, our Intercambio App, multimedia material, the book *Pronunciation Fun*, and organized Conversation Practices events (fieldtrips, Community Conversations, Happy Hours, etc.).

Activity 2:

- Host **one-on-one** English Classes **online and in-person to 8 adult-immigrants Louisville residents** (per year). Classes will be taught by **volunteers**.
- **Location:** One-on-one classes are held at the student’s or volunteer house.
- **Timeline:** One-on-one classes will be held **all year** (students can pair with a teacher at any time) beginning in January 2025, for a duration of two hours per class, throughout the grant period.
- **Levels:** One-on-one classes will cover levels Intro through Level 6 (advance), depending on demand. Usually, level Intro is the most demanded.
- **Curriculum:** We will use our proprietary materials, *Confidence and Connections*, consisting of two books per level, our Intercambio App, multimedia material, the book *Pronunciation Fun*, and organized Conversation Practices events (fieldtrips, Community Conversations, Happy Hours, etc.).

3. **Program measurements:** Provide the following information for the program/activities for which funding is requested:

3.1. Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

Our Local English Programs target residents of all **Denver Greater Region** (7-county Denver Greater Area), with a higher demand from **Boulder County** and, specifically, Longmont.

The **overall population** targeted and expected to attend our classes does not vary significantly from year to year. Our students are adult non-native English speakers (mostly immigrants) with low socioeconomic status, aiming to improve English skills for work, family, or integration. We help tackle racial and socioeconomic inequities faced by our targeted population. They report that communication barriers make their voices **underrepresented** in community and institutional settings, and that they struggle to advocate for their own **social participation**. We serve students from 45-55 countries with most from Mexico and Venezuela. South Korea is also notably represented (in total, students speak over 30 mother-tongue languages). 64% of them are women. Ages range from 18-77, with a median age of 36 years old, and 53% of them have children at home. Students have diverse educational backgrounds: 25% are college graduates, and 23% haven't completed high school or a GED. Nearly all students report "very low income" (≤\$73,000 for a 4-person household in Boulder County).

Specifically for **Louisville residents**, last fiscal year we served 17 students, with 15 females and 2 males. Among those who chose to disclose their race, five identified as Hispanic/Latino, two as Asian, and two as White. In terms of age, six were between 18-30 years old, nine were between 31-54, and two were over 55. Their countries of origin included a majority of Central and Latin America countries (14 people), as well as South Korea (1), Russia (1), and Czech Republic (1). Most arrived in the U.S. in 2022, though many preferred not to disclose their year of entry. Income-wise, a majority of 15 earned under \$12,000 annually for one person (not household), while 2 earned between \$20,000 and \$50,000. In terms of teachers, we had 7 teachers from Louisville. We expect those demographics not to vary significantly for the duration of the requested grant.

We collect mixed data and continuously work to improve our M&E efforts to ensure our service has the greatest impact. To collect and pull-out **quantitative data**, we use **Salesforce**, which gathers registrations, attendance, passing grades, and sociodemographic information, among the most relevant data. Every time a participant completes a form, the data transfers to Salesforce. Teachers also gather information in the classrooms and a staff member introduces it in Salesforce.

Our **anticipated Quantitative Outcomes** are:

Activity 1:

One Term-long outcomes:

1. 75% of students completed the term they start.
2. 93% of teachers completed the teacher training.
3. 80% of retention rate among students.
4. 85% of retention rate among teachers.
5. 80% of students attended at least one conversation practice (Community Conversations, fieldtrip, etc.).

Indicators:

1. % of students that completed term.
2. % students re-enrolling in term.
3. % teachers that completed training.
4. % teachers re-enrolling in term.
5. % students that attended Conversation Practices.

Source of verification: Salesforce.

Activity 2:

One Term-long outcomes:

1. 80% of students completed the term they start.
2. 93% of teachers completed their teacher training.
3. 85% of retention rate among students.
4. 90% of retention rate among teachers.
5. 80% of students attended at least one Conversation Practice.

Indicators:

1. % of students that completed term.
2. % students re-enrolling in term.
3. % teachers that completed training.
4. % teachers re-enrolling in term.
5. % students that attended Conversation Practices.

Source of verification: Salesforce.

3.2. Qualitative measures: How will you measure the success of this program/activity?

To gather qualitative data, we conduct **pre- and post-term surveys** to students every six months.

Pre survey questions focus on reasons for learning English at the family, education, work, and community levels. The responses help our curriculum team refine our materials.

Post surveys address the same topics as our long-term outcomes (see below), facilitating the comparison of results. Questions relate to **feelings of belonging, English proficiency, and self-sufficiency**, directly addressing the inequities identified earlier. We share student feedback with teachers, including their post-assessments in reading, writing, and speaking. Additionally, we offer our students the opportunity to write qualitative feedback about our services, which every year provides us with different letters of support and testimonials.

Teachers are surveyed through a mix of closed-ended and open-ended questions to determine if their volunteer goals and expectations were met. Teachers also provide testimonials every year.

We also hold different levels of **staff meetings** weekly and monthly as part of our monitoring efforts, where we assess efficiency, efficacy, and achieved outputs. Minutes are recorded to foster accountability.

Our **anticipated Qualitative Outcomes** are:

Activity 1:**Annual-long outcomes:**

1. 35% of students have increased **confidence** speaking English.
2. 25% of students don't need **interpreters** at Doctor's office or their children's schools.
3. 50% of students can **share their ideas and experiences** in English.
4. 80% of students feel **welcomed** in the community.
5. 75% of students **use English at work** sometimes or more often.

Indicators:

1. % of students with an increased confidence speaking English.
2. % of students speaking English at Dr. offices and/or at children's school.
3. % of students able to share their ideas and experiences in English.

4. % students feeling welcome in their community.
5. % students using English at work sometimes or more often.

Sources of verification: Pre- and post-participation surveys and free open-ended feedback (mostly testimonials).

Activity 2:

Annual-long outcomes:

1. 35% of students have increased **confidence** speaking English.
2. 25% of students don't need **interpreters** at Doctor's offices and/or their children's schools.
3. 50% of students can **share their ideas and experiences** in English
4. 80% of students feel **welcomed** in the community
5. 75% students **use English at work** sometimes or more often.

Indicators:

6. % of students with an increased confidence speaking English.
7. % of students speaking English at Dr. offices and/or at children's school.
8. % of students able to share their ideas and experiences in English.
9. % students feeling welcome in their community.
10. % students using English at work sometimes or more often.

Sources of verification: Pre- and post-participation surveys and free open-ended feedback (mostly testimonials).

4. **Evaluation:** If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

In our last grant application, we anticipated having 15-20 students per year. So far, we have had an **average of 13 students annually**, with a clear increase of students so far in 2024 as compared to 2023 (up to September 2024, we have had 15 students already). We anticipate reaching **19 students by the end of the year**, as our last term has not started yet. 71% of students have enrolled in group classes, and 29% in our one-on-one format. We are estimating a similar proportion for next year's program.

Conversation Practice events had an attendance of 72% of students. Post-evaluation surveys showed that **50% of students can now share their ideas in English and 67% feel welcome in the community**. Furthermore, our **retention rate stands at 76%**.

As seen, 2024 is experiencing a **clear increase** in the number of students served as compared not only to 2023 but also to 2022. Overall, Intercambio **has more participants**. Our student percentage growth from last fiscal year ranges **from 19% to 100%**. Since we have a greater demand, we need additional resources to meet it.

We are also piloting **Intercambio Learning System (ILS)**, which enhances our video conferences, registration, accessibility, and process automation. Students are engaged as testers, providing feedback on the system.

This year, we held our first in-person **Volunteer Appreciation** Day since the pandemic, attended by 100 teachers from all Boulder County.

In terms of Community Engagement, based on pre- and post-surveys results, we're introducing new activities like Casual Lunches and Happy Hours to promote teacher retention and class quality.

Challenges:

1. There is a **limited number of teachers** available to teach in our Longmont facility.
2. As we grow in number of students, **our physical classrooms are limited**. Particularly, morning classes are underutilized due to a low availability of students who are employed, and evening classes have a waitlist.

Solutions:

1. We're exploring new ways to use space, including **building construction, potential collaborations and weekend classes, and expect that the launch of ILS** will increase opportunities in an online format. All those initiatives are already in our Strategic Plan 2024-2026 and six different staff committees are currently working to make these changes possible.
2. We are making significant efforts to establish **promising partnerships in Louisville** and nearby cities that would serve more students and volunteers in the area by offering their facilities to hold classes and by referring their clients to our services when appropriate.
3. We have **increased our staff**—marketing and communications, outreach, and programs—. We expect that this will provide additional resources to engage and assist students, and to recruit volunteers.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

5. Leadership:

- How many people serve on your Board of Directors and how many of these are Louisville residents?

Intercambio is governed by a diverse, passionate, and involved Board of Directors composed of 11 members. Half of them are people of color and bilingual. The Board oversees the Executive Director, develops and oversees the Strategic Plan, acts as community ambassadors, fundraises, maintains financial accountability, and recruits new members. Board members serve on Program, Fundraising, Finance, Equity, Strategic Planning, and Personnel Committees. Board terms are three years with a two-term limit, and each member makes a personally significant annual contribution. Currently, one Intercambio board member is a Louisville resident.

- How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

Intercambio employs 20 individuals with a full-time equivalent of 18. Currently, none of our staff members reside in Louisville.

- Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.

Intercambio's volunteer teachers are a **vital part of our model**. They dedicate their time to help English language learners succeed. They foster cross-cultural connections, bridge racial gaps, provide human-centered services, and help us maintain affordable fees for our students.

Our volunteers teach from our *Confidence and Connections* curriculum for at least 3 hours per week, evaluate students' progress, and participate in activities like organized field trips and Conversation Practices. All volunteers complete an initial Teacher Training, familiarizing themselves with the Intercambio Way®, the curriculum, and our available resources.

Beyond teaching, **social gatherings** like *Community Conversations* bring volunteers and students together for rotation-based, express conversations on various topics, enhancing opportunities for connections. In response to volunteer requests, we've also introduced Potluck Days and Casual Lunches after morning classes, fostering community among volunteers. Our Volunteer Appreciation Day gathers about half of our teaching corps each year.

Our volunteers are **incredibly dedicated**, with a retention rate of over 70% from term to term. Half of our teachers have been with us for two years or more, and many have volunteered for 5 to 9 years.

Given the large number of volunteers, the essential role they play in our services, and the variety of teaching formats (group, one-on-one, different levels), it's challenging to precisely estimate the total number of volunteer hours contributed annually. However, we can estimate the following:

- Teacher training is approx. 10 hours in total.
- Group volunteers invest 4 hours per week for 9 weeks (36 hours per term).
- One-on-one volunteers dedicate 3 hours per week, with a minimum of 27 hours per term (self-

- paced, so duration may vary).
- Community Conversations events are optional and require 1.5 hours per term.

Therefore, each teacher can contribute a **minimum of 37 hours annually, depending on the teaching format. Last fiscal year, we had 163 unduplicated** community members as volunteer teachers and co-teachers, 23 more than the previous fiscal year, with seven of them being Louisville residents.

- Who will be responsible for the administration of the program or service?

Norma Fuentes Gallo is the Director of English Programs at Intercambio and will be responsible for overseeing this service. Norma is a well-respected community leader and cultural broker, with a remarkable ability to build connections cross-culturally. She plays a pivotal role in fostering a sense of unity and collaboration at Intercambio, helping to forge strong partnerships with school districts, faith communities, and other nonprofit organizations. Norma oversees all our classes for students and volunteer teachers, locally and nationwide, ensuring that students receive the best English classes possible and that volunteers are well-supported.

Norma began her journey with Intercambio in 2006 as a volunteer, then as a student in 2007. She officially joined our staff in 2008, bringing a wealth of experience from her previous work with Head Start Boulder County, the Family Literacy Program, and Saint Vrain School District. Originally from Chihuahua, Mexico, Norma has lived in the United States for many years, dedicating herself to helping, connecting, and teaching our community with her passion and positive attitude.

Norma has been honored with many awards, including:

- Non-Profit Leader Award presented by the Latino Chamber of Commerce (2024)
- Women Who Light the Community presented by the Boulder Chamber (2020)
- The Community Service Award presented by the Twenty-Eighth Annual Multicultural Awards (2016)
- The Community Unity Award presented by the Longmont City Council (2011)

Norma's leadership and heart continue to strengthen and empower the diverse community she serves.

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

We **make and receive referrals** to and from other local agencies that provide complementary services to low-income and immigrant residents in the area:

- Open Doors teaches English to immigrant kids.
- El Comite provides pro-bono case management and related services to immigrants.
- HHSS governmental departments offer various sources of support, such as involving Latino parents in their children's education (PIE).
- I Have a Dream or Front Range Community College expand academic educational opportunities to immigrants.
- Sister Carmen Community Center helps cover basic living expenses for low-income residents.
- Longmont and Boulder Public Libraries offer English classes to adult immigrants.

Additionally, we partner with Thrive, Boulder Housing Partners, KONG Radio, OUR Center, THORNE, Boulder County Housing, WellMind, and Cities of Louisville, Broomfield, Lafayette, Boulder, Longmont and BoCo County. These collaborations aim to **share in-kind space, refer clients, organize field trips, participate in needs and program assessments, and provide fiscal sponsorship**. Together, our partnerships ensure that we are effectively meeting the needs of immigrants in Boulder County.

Currently, we are in conversations to close some partnerships in Louisville and nearby cities that would serve more students and volunteers closer to their homes. These potential partners would offer their facilities, help us recruit volunteers, and refer their clients to our services.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

- Program budget runs on a fiscal year, starting July 1st and ending June 30th.
- Funding sources anticipated (see below) are calculated for two years, 2025 and 2026, for the entire English Program for Louisville residents.
- The Agency budget attached to this application intentionally reflects a deficit. It requires \$500,000 of funds (already in our bank reserves) from a generous Yield Giving award we recently received. The \$500,000 will fund the first year's overhead of three staff members as well as infrastructure, innovative programming in Boulder County, inaugural public relations, and business development activities.
- We are requesting an increase in funding from the City of Louisville as compared to our prior application. The reason is that we have more students. A comparison between the number of students last year and those enrolled so far this fiscal year shows percentage growth ranging from 19% to 100%. We have a greater demand and need additional resources to meet it. We are also establishing promising partnerships in Louisville and nearby cities that will engage more students and volunteers in the area.

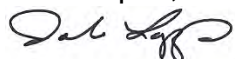
**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Government Grants	\$12,520	10%
Foundation Grants	\$34,545	29%
Fundraising and Contributions	\$53,874	45%
Program Service Fees	\$2,340	2%
Investment Income	\$2,268	2%
Other Revenue		
Other Revenue A: Event Income (less expenses)	\$11,830	10%
Other Revenue B: Business Sponsorships	\$2,100	2%

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature
John Lopez, CEO



Agency Director

303-996-0275

Telephone Number

stephanie@intercambio.org

E-Mail Address

Signature
Laurie Mittenthal, BP



Board President

303-996-0275

Telephone Number

lauriemitten@gmail.com

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to

disclosure and indemnifies the City for any charges directly related to the City's disclosure.



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

INTERCAMBIO DE COMUNIDADES
4735 WALNUT ST STE B
BOULDER, CO 80301

Date: August 24, 2022
Employer ID number: 20-0078381
Form 990 required: 990, Yes
Person to contact: Name: Ms. Chung
ID number: 0777227

Dear Sir or Madam:

We're responding to your request dated April 06, 2022, about your tax-exempt status.

We issued you a determination letter in September 2003, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax-deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period.

- Form 990, Return of Organization Exempt From Income Tax
- Form 990-EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements



Board of Directors as of 2024

First Name	Last Name	Occupation	Residence	End of Service
Valicia	Trowbridge (Chair)	Bilingual Immigration Attorney, Murad & Murad Law Firm	Boulder	2027
Chris	Evans (Vice Chair)	Vice President, First Bank	Erie	2026
Yesenia	Núñez (Treasurer)	Multi-Cultural Banking Officer, FirstBank - Boulder Market	Louisville	2027
Arnie	Jacobson (Secretary)	Founding Partner, The Qualitative Research Centre	Boulder	2025
Phil	Frey	President, B&F Properties	Boulder	2027
Marcela	Miyazawa	Former Director of Product, X (Twitter)	Menlo Park, CA	2025
Howdy	Pierce	Chairman & Founder, Cardinal Peak; Visiting Instructor, CMU-Africa - Carnegie Mellon University	Boulder	2025
Christy	Speirn-Smith	Retired Associate Director, Intercambio Uniting Communities	Boulder	2025
Maria	Stepanyan	Executive Director, Center for People With Disabilities	Longmont	2025
Greg	Jones	Retired VP, FactSet StreetAccount	Boulder	2024
Carolina	Beach	Co-Founder, Horse d'oeuvres, LLC	Longmont	2025



Management Team July 2024

John Lopez, PhD, Chief Executive Officer (*Joined Intercambio in 2022*) John has two decades of executive leadership, strategic and operational management, and public policy and advocacy experience at higher education institutions, public, private, publicly traded, and nonprofit organizations. He has served as president of Lopez Research & Consulting, senior consultant for Marzano Research, and chief administrative officer at the Western Interstate Commission for Higher Education. He also wrote *An Immigrant in the C-Suite*, and is member of the Board of Trustees for Herzing University. John earned his PhD in higher education specializing in management and policy from the University of Arizona.

Norma Fuentes, Director of Programs (*Joined Intercambio in 2008*) Norma first became involved with Intercambio as a volunteer in 2006 and then became an English student in 2007. She started by coordinating Intercambio's Longmont programs and has been instrumental in growing that program dramatically over the past decade. In 2020 Norma moved into a role managing all of Intercambio's student and volunteer programs across Boulder County, and is now overseeing all student and volunteer programs online and in-person nationwide. She received the 2016 Boulder County Multicultural Award and the 2011 Longmont Community Unity Award in Longmont. Norma is originally from Chihuahua, Mexico, and previously worked with Head Start and the Family Literacy Program.

Rachel Fuchs, Director of Partner Services (*2008*) Rachel is a Boulder native who has held a variety of roles working with our Boulder County English program and with our national partners. Rachel has served as a Peace Corps Volunteer in Costa Rica, teaching English for youth and adults at the beginning level. Rachel studied Economics and Public Policy at The University of Chicago where she was also involved in local community issues facing immigrants. She holds a Master's degree in Public Administration from the University of Colorado - Denver.

Leanne Chacon, Director of Curriculum and Training (*2015*) Leanne taught English in Chile; was Academic Coordinator of English language programs at the U.S. – Chile Binational Center; Program Director for a national English scholarship program of the Chilean Economic Development Agency; and oversaw training for English-speaking volunteers at the Chilean Ministry of Education. Leanne completed her undergraduate degree in Spanish for the Professions at the University of Colorado at Boulder and holds a Master of Education in Global Studies in Education from the University of Illinois Urbana-Champaign.

Paul Melroy, Director of Operations (*2024*). Paul began his career as a commercial banker, and has worked for several decades managing finance, operations, and as an executive director in several arts organizations, and with a program supporting unhoused veterans. He is also a proud Navy veteran and holds a Bachelor's in Business Administration from Mercer University in Atlanta.

GRATITUDE REPORT 2023

Fiscal Year 2023: July 2022-June 2023



TEACHING
ENGLISH
♥
CONNECTING
PEOPLE

Celebrating the End of a Another Great Term

193/251

intercambio
UNITING COMMUNITIES

A LETTER FROM OUR CEO



John Presenting a Certificate at a Last Day of Classes Celebration

In the past year as Intercambio’s CEO, I have continued to be inspired by the heart of our organization — its overwhelming commitment to connection. **Every person I have interacted with is dedicated to building connections across culture and through conversation in new and powerful ways.**

Over the past year, amidst numerous transitions, our staff remained dedicated to providing high-quality products, services, and assistance to ensure the success of our students, volunteers, partners, and supporters. In that time:

- **Nearly 700 students and volunteers** connected through English classes in-person or online.
- Our **curriculum and resources were sold in 48 states** plus D.C. and Canada.
- **Over 40,000 copies** of our *Confidence and Connections* curriculum were sold.



With gratitude,
John
John Lopez, PhD
Chief Executive Officer

As we take a moment to reflect on where Intercambio has come and what we have accomplished, I am thankful for the faithful support of our organization’s participants and friends. **Because of your immeasurable generosity, Intercambio is entering its 22nd year better poised to continue expanding our connections locally and nationwide.**

Thank you for your ongoing investment in Intercambio as we continue to teach English, connect communities, and change lives.

STENZONCO

Intercambio's Mission	4
FY2023 Impact at a Glance	5
Boulder County Snapshot	6
CC English Overview	8
Intercambio Network Recap	10
Highlights from Curriculum and Training	12
Donors, Board, and Staff	14
Financials	19

MISSION

To bring English learners and community volunteers together in language classes and gatherings to **build skills, confidence, and life-changing connections**



Celebrating the End of a Successful Term



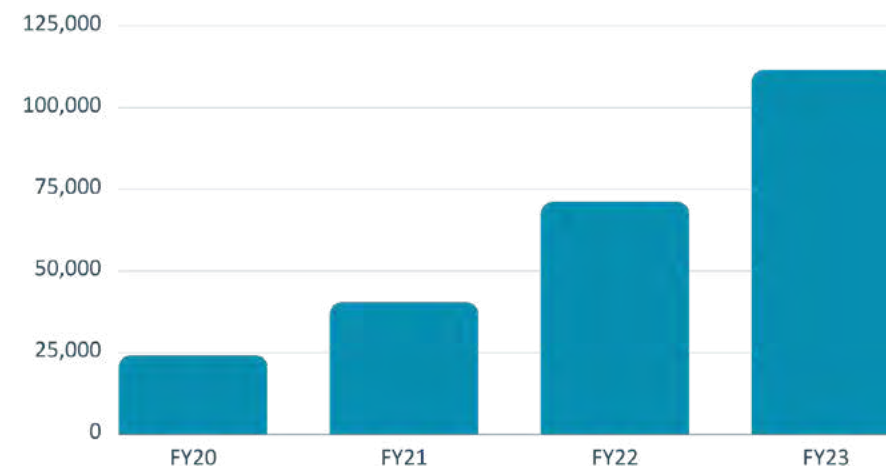
IMPACT AT A GLANCE

DATA FROM FISCAL YEAR 2023

587 students & 128 teachers 
learned together for more
23,000 hours
in Boulder County

Online across the U.S.
 **307**
students & teachers
built English skills & connections

 **93 Organizations**
throughout the nation
were paid members of the
Intercambio Network



 **Intercambio**
has sold over
110,000
textbooks of our
curriculum since 2020

Cumulative Sales of Our Teacher and Student Confidence and Connections Books through FY2023

GRATITUDE + GIVING BACK
The Connections that Create Opportunity

This summer, we sat down with Boulder County students Julio and his daughter, Alenia. The conversation spoke volumes about the type of people they are. As they shared their own stories, Julio and Alenia spoke of the meaningful connections they have made since they started taking English classes with Intercambio and the ways they are working to give back to their community.

- Julio:** "Julio is a simple name and person. I am a Cuban immigrant. I came with my daughter here four months ago."
- Alenia:** "I'm 20 years old, and I'm taking classes with Intercambio, and in Front Range [Community College]. But the first organization that we met was Intercambio. I feel great in Intercambio, and I think that here you have a big community that helps immigrants and all kinds of people."
- Julio:** "We are in the U.S. because two angels I took on a tour as a tour guide in Havana — their organization: Trees, Water, and People. When they returned to the U.S., we maintained a very good communication between us. When we felt that we can't resist the [political] situation in Cuba, I called them. They said, 'Whatever we can do for you, we will do it.'"



Father & Daughter English
Students Julio & Alenia

Julio: "It has been a very incredible experience for us and for many people we know. Taking class in Intercambio is the best for us."

[Alenia] is in love with her group there, and she doesn't want to leave. She wants to continue, even when she is studying in the Front Range [Community College]. She wants to continue that, and I do too."

- Alenia:** "I'm so grateful for Intercambio. It's so important because there you can meet other people and a new community. You learn that you are not alone. You have people that support you."

My teacher is Mercedes. I think this was her first time teaching. She doesn't know how good she is. She's amazing. I want to continue with her, with my group. Mercedes is always encouraging all the students. We speak about everything. I want more classes on more days of the week!

These classes make my life more happy because we can share. And I feel that, of course, I improved my English. And I'm growing up as a person. We have a lot of new opportunities with Intercambio."
- Julio:** "If I reach my goal to have better English, I will be there with [Intercambio] volunteering to do whatever. Even cleaning! Because it's my mission, you know, wherever I go. I like people a lot. Maybe my life put me in this condition."

Sometimes I do things for people that I don't do for me, like volunteering at [Emergency Family Assistance Association]. I need to. Not, only to [receive] — I need to give. I want my children to be like this. It is not easy, but I think that it's better to give."

MEET THE TEAM



Norma Fuentes Gallo
Boulder County Program Director



Alma Chavez
Assistant Director of Boulder County Program



Louis Gaston
Group Class Manager

Micaela Armijos
Volunteer Manager



Yoli Chavez
Group Class Manager



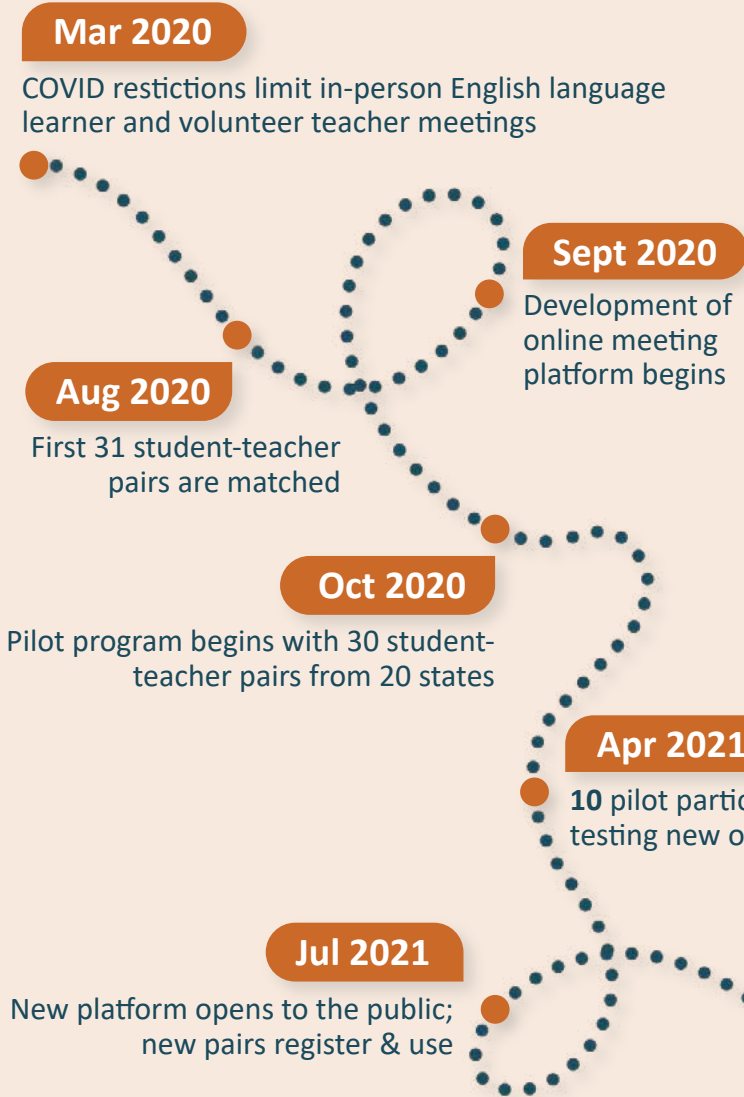
From July 2022 to June 2023:

287 new students
enrolled in English
classes in Boulder County

96% of volunteers
felt that participating in a Community
Conversations event **increased their
confidence to connect cross-culturally**

24%
of volunteers
have taught for
five years
or more

Community Conversations are one-time events that facilitate conversations between English language learners and volunteers



From July 2022 to June 2023:

Students from **39** countries

connected with

Teachers in **101** cities

MEET THE TEAM



Becky Campbell-Howe
Director of Ops & CC English



Jon Dejeas
CC English Manager



Tina Hayes
CC English Matching Coordinator

"WE'RE LIKE FAMILY"
BUILDING BONDS THROUGH ENGLISH CLASSES

We're excited to introduce you to Lea, a teacher within Intercambio's online program CC English, who shares how volunteering with Intercambio has impacted her life.

"I have lived in Colorado almost continuously since I was 10 years old. I retired in 2012 after working in education for 30 years.

I first became aware of Intercambio several years ago. I had been searching for a volunteer opportunity that would be a good fit for me since retiring. In March 2022, I was contacted by CC English and asked if I was interested in volunteering to be a tutor via Zoom. I eagerly said yes!

I had no idea at the time what a positive impact becoming a CC English tutor would have on my life! My student, Shuying—from China—and I bonded quickly and soon texted each other every day in addition to our three hours of class each week.

Sometimes, we would continue our class past the hour and a half session because she had questions, or we wanted to continue our conversation. Shuying's three-year-old son often wanted to say hello and show me his toys. He and I became fast friends.

When it came time for our field trip lesson, Shuying and I decided to meet at the Dushanbe Tea House in Boulder for lunch. That was our first time meeting in person. **Since then, we have been guests in each other's homes several times and have done other things together.**

We celebrated our birthdays together, went swimming during the summer, have watched movies together, went to holiday light displays in December, and most recently, we cooked Chinese food in my new wok at my house.

We have so much in common and feel that being matched by CC English was 'fate.' I have become their son's American 'grandmother' and have a basket of toys at my house to entertain him. **We feel like we're family and are so happy to have met.**

I feel so much gratitude for my life, and it is wonderful when I find opportunities to give back to the universe. **I am very happy to have found Intercambio, which allows me to fulfill my desires to contribute to a better world!"**

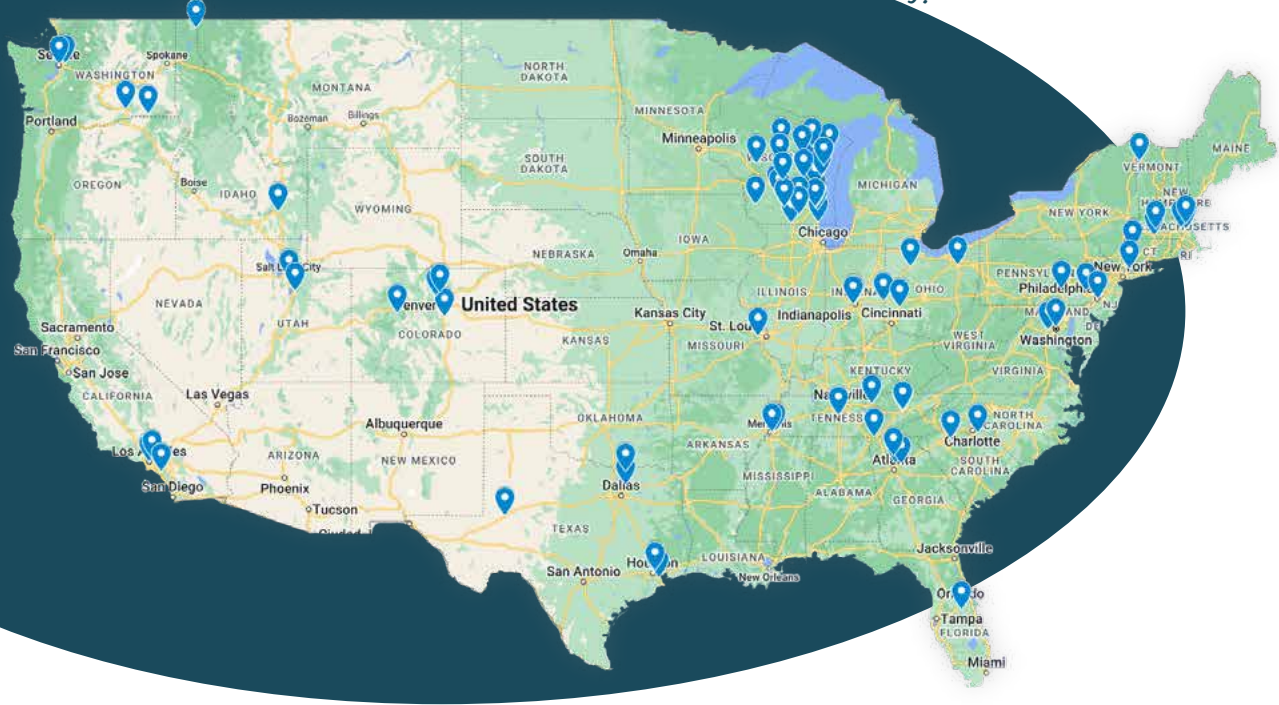


English Student Shuying & Her Volunteer Teacher Lea

Supporting organizations with resources & networking opportunities

INTERCAMBIO NETWORK

From July 2022 to June 2023, the Intercambio Network was made up of:



93 member organizations within 78 cities serving over 20,000 immigrants & refugees



From July 2022 to June 2023:

40,385

Copies sold of our adult ESOL curriculum textbooks *Confidence and Connections*

13,074

Copies sold of our practical guidebooks about life in the U.S., *The Immigrant Guide*



Kandyce Sharing Materials at Literacy Expo

MEET THE TEAM



Rachel Fuchs
Director of Partner Services



Kandyce Pinckney
Partner Services Engagement Manager



Kira Wolfson
Partner Services Relationship Manager

NEARLY 1,000 PROJECT LITERACY PARTICIPANTS BUILD SKILLS + CONFIDENCE

Janet Saied, Director of Project Literacy, shares why her program purchased and will continue to use Intercambio's resources.



"Project Literacy is an adult English Language Learner (ELL) community-based program that offers free English classes, citizenship classes, legal immigrant services, and other resources in Watertown [Massachusetts]. Our goal is to help our non-native English speakers feel comfortable and be successful in our community.

Our program is one of the largest, if not, the largest, library-based adult ELL programs in the state. We have close to 700 students, with 10 professionally paid teachers, and over 200 volunteers.

I first heard about Intercambio a year ago. To be honest, teachers are constantly coming across new textbooks to use, so I think it often takes a couple of exposures with a textbook to begin to consider using it. **There are two main reasons why I've chosen Intercambio and many reasons why I will continue:**

- 1 Each topic is relatable to our adult learners. **Not only is the vocabulary relevant but our students can relate to the content.** They can see themselves in the pages of these books. The content is not generic, and students can easily engage with each other.
- 2 In addition, students usually have to borrow English textbooks from the library because each one is so expensive. **We're able to give our students Intercambio books, so they can write, highlight, and use their books as they wish.** It adds to their learning experience.

We'll continue to use Intercambio because of their online resources and other supplemental materials. Their teachers' guides are great; an excellent resource! **Some of our volunteers who have no English teaching experience are able to feel confident helping their learners with these books."**

From July 2022 to June 2023,
Intercambio hosted workshops for over:

230 Volunteer Teachers
& Network Members

"I am so excited about many of Intercambio's offerings, and I have been utilizing your tools and practices more and more in my classroom!"

- ESOL Teacher

"This information is exactly what we need with the fall start of our Refugee Resettlement ESL and Community Connections program of North Dakota."

- Program Administrator



Showcasing Curriculum @ COABE



Leanne's Pronunciation Workshop

SHARING INNOVATIVE, COMMUNITY-BUILDING APPROACHES TO ESOL INSTRUCTION

National conferences provide an opportunity for Intercambio increase visibility and credibility while building valuable partnerships with other organizations. Through these conferences, Intercambio engages in mutual learning by sharing and learning more about adult education initiatives while showcasing its own curriculum. From July 2022 through June 2023, the Curriculum and Training Department represented Intercambio at **eight national adult education and literacy conferences** across the U.S. The team presented workshops on topics around the myths and truths in adult language learning, facilitating conversations on race and equity, and building belonging in the classroom. Beyond conferences, Intercambio provides regular trainings and events for its own volunteer teachers and the teachers and administrators of other organizations.

ENGAGING TOOLS FOR EXTRA TEACHER + STUDENT SUPPORT

This year, the Curriculum and Training Department developed and launched a collection of worksheets that provide learners extra practice with language structures in Intercambio's *Confidence and Connections* curriculum. The worksheets also include expansion activities that students and teachers can do together to support real-life speaking skills. Since their launch in January of 2023, the worksheets have been downloaded more than 60,000 times. A grateful worksheet user noted:

"Each student has only one hour a week for tutoring, and the volunteer tutors often do not have much experience or training so additional structured practice activities are really helpful. We very much appreciate the extra worksheets."

The department is excited to continue adding to the collection in the coming year.



Karin Coaches Volunteers at a Community Conversations Event

MEET THE TEAM



Leanne Chacon
Director of Curriculum and Training



Karin Bates
Curriculum and Training Specialist

We're incredibly grateful for the generosity of the donors who help to fund life-changing connections.

THANK YOU!

- Elke Adler and Jim Callanan

Sandor Aguilar

Brooke Alt and William Huffer

Emily Andrews and Brian Ross

Elsa Angrist

Matt Appelbaum and Joni Teter

Jennifer Arbogash

Brad Armstrong and Julie Dolin

Liz Armstrong

Cathy and William G. Arnold

Peter Aweida and Lalenia Quinlan Aweida

Meav Azoulay and Rory Donnelley

Stephanie and Doug Bachman

Andy Bachmann

William Baker

Chris Barge and Erin Koenig

Amy Batchelor and Brad Feld

Karin Bates

Carolina and Chris Beach

Mary Beach

Rex Beach

Ingrid Becher

Susan Becker and Jim Beall

Barbara Behrendt

Audrey Benedict

Deborah Bernardoni

Laurie Bernstein

Libby and Dennis Berry

Catherine Bickell

Stuart Bindeman

Ken and Kim Bixel

David Black

Mary Blacklund

Rachel Bloombaum and Scott Hamilton

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Jennifer Braun and Jody Shevins

Toni and Dan Brennand

MaryAnn and Roger Briggs
- Terry and Amy Britton

Eleanor and David Brode

Jane Brooks

Sky Brooks

Debra Brown

Sue and James Brundege

Pat and Jim Brunelle

Carolyn and Joel Buck-Gengler

Dylan Buli

Micheline Burger

Catherine and Andy Burgess

Rosemary Campbell

Becky Campbell-Howe and Jim Howe

Nicole Cantrell

Joel and Renie Cantrick

Darin Carlson

Erika and Jeremy Carlson

Sharon Carlson

Lorenzo Castano

Rob and Krista Castellino

Debra Caswell

Sandra Cave

Coreina Chan

Donald Chavez

Alma Chavez

Daphne Chellos and Bruce Swinehart

Marian Dines and Joanne Christensen

George Clark and Susan Williams-Clark

Spencer Clark

Claire Clurman

Richard Collins and Judy Reid

Linda Conte and Peter Bryant

Janice

Lawrence Carlson and Poppy Copeland

Susan Corbett and Steve Kremm

Maye Cordero

Virginia Corsi

Colette Crouse

Karen Cumbo

Naomi Curland

Catherine Curran

Kevin Daly

Jill and Tom Darrah

- Ellen Daugherty

Alan and Tessa Davis

Eithne and Ray Davis

Pete and Joan Dawson

Suzanne DeAtley

Raylene Decatur

Kim and Ethan Decker

Jon Dejeas

Pam Dennis and Jim Semborski

LiMin Depenning and Boyce James

Jenny and Stephen Desmond

Mark and Trish Devlin

Heather and Trevor Dieck

Mary Dineen and Sue Masterson

Sarah Dodson-Knight and Edward Knight

Paul Dreyer

Duane and Debbie Duggan

Rebekah Dumouchelle

Bruce Duncan

Sandy and Gale Dunlap

Phillip Durian

Virginia and Todd Dutkin

David Ebner

Dana Edwards

Jane and Walt Enterline

Chris Evans

Joel Feldman

Jim & Diane Ferrero

Ardith Ferguson

Rebekah Fisher

Audrey Fishman Franklin and Andy Franklin

Lydia and Scott Flores

Pamela Flowers

Claire Floyd

Susan and Benjamin Foster

Jeannine Fox

Susan and Steve Freiman

Sandy and Steve Friedman

Nancy Fritch



- Rachel Fuchs & Shawn Camden

Norma Fuentes-Gallo

David Fulton-Beale

Robert Bernthal and Leona Furnari

Marilyn Gallant

Alex & Tierney Gerber

Shelly Gerding

Elizabeth Gillette

Angie Giustina

Teri Golden

Barbara Goodman

Gilad Gordon

Kenneth Gottschalk

Linda and Jerome Gottschalk

Steve Grad and Jacqueline Wurn

Bob and Peggy Graham

Daniel and Brooke Gray

Susan Green

Rich Gribbon and Robin Noble

Sue Ellen Grimaud

Kimberly Gustafson

Tony Gutierrez

Robert and Devan Haas

Joan Haid

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Olga and Andres Jacobi

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Janice Zelazo
Dave Ziegler
Pam Zola

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Pam Zola

THE SCHOLARSHIP CLUB

Your monthly gift supports English language learners with need- or merit-based scholarships.

Join The Club by setting up a monthly donation at Interambio.org/donate

“I know that being able to speak English opens up new doors and possibilities to the people who still come here looking for a second chance. I want to help them realize their American Dream.”

- Scholarship Club Member

FOUNDATIONS

Anschutz Family Foundation
The April Fund
Argosy Foundation
AV Hunter Trust
Broomfield Community Foundation
Community Foundation
Boulder County
First Congregational Church of Boulder
Fred & Jean Allegretti Foundation, Inc.
Gateway Fund II of the
Denver Foundation
Mabel Y. Hughes Charitable Trust
Jay & Rose Phillips Foundation
of Colorado
Kathryn Conway Preyer
Charitable Lead Trust
Kettering Family Foundation
Left Hand Giving Circle
Nora Roberts Foundation
Oreg Foundation
Ray Solem Foundation
Red Empress Fund
Sam S Bloom Foundation
Schlessman Family Foundation
The Schocken Foundation
Whitt Family Foundation



Students Enjoying an End-of-Term Celebration



Boulder County
Community Services
City of Boulder - Housing
& Human Services
City and County
of Broomfield -
Human Services
City of Longmont -
Human Services
City of Louisville
Colorado Refugee
Services Program

LOCAL GOVERNMENT

Bigsby's Folly
Compass Real Estate
CordenPharma Colorado
EcoProducts
FirstBank
Hazel's Beverage World
Latitude40 Real Estate
Melton Design Build
Meow Wolf Denver
The Oxford Hotel
Prarie Mountain Media
Sleeping Giant Brewing
Spirit Hound Distillers
TransLingua
Uka Consulting

BUSINESS PARTNERS & SPONSORS

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Valicia Trowbridge, *Vice chair*
Arnie Jacobson, *Secretary*
Greg Jones, *Treasurer*
Carolina Beach
Edgar Chavarria
Chris Evans
Phil Frey
Arnie Jacobson

Greg Jones
Jane McConnell
James Mitchell
Marcela Miyazawa
Joyce Neville
Yessenia Nuñez
Howdy Pierce
Christy Speirn-Smith
Maria Stepanyan

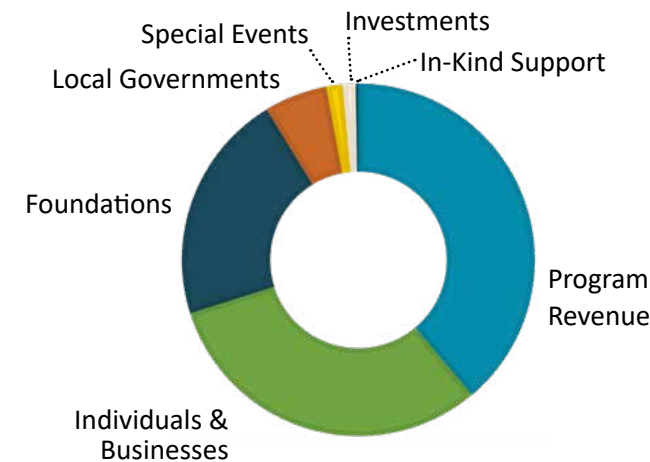
STAFF

John Lopez, *Chief Executive Officer*
Jenny Desmond, *Interim Executive Director*
Micaela Armijos, *Volunteer Manager*
Emily Ashley, *Data Entry Assistant*
Karin Bates, *Curriculum and Training Specialist*
Becky Campbell-Howe, *Director of Operations and Technology*
Erika Carlson, *Grants & Evaluation Manager*
Leanne Chacón, *Director of Curriculum and Training*
Alma Chávez, *Assistant Director of Boulder County Program*
Yoli Chávez, *Group Class Manager*
Jon Dejeas, *CC English Manager*
Rachel Fuchs, *Director of Partner Services*
Norma Fuentes-Gallo, *Director of Boulder County Programs*
Louis Gaston, *Group Class Manager*
Elizabeth Gillette, *Director of Development*
Kelsey Harvey, *Assistant Director of Development*
Tina Hayes, *CC English Coordinator*
Alexa Laaker, *Administrative Manager*
Jordana Levine, *Student Services Coordinator*
Kandyce Pickney, *Partner Services Engagement Manager*
Joanna Watkins, *Assistant Director of Marketing & Communications*
Kira Wolfson, *Partner Services Relationship Manager*



FY 2023 Financials

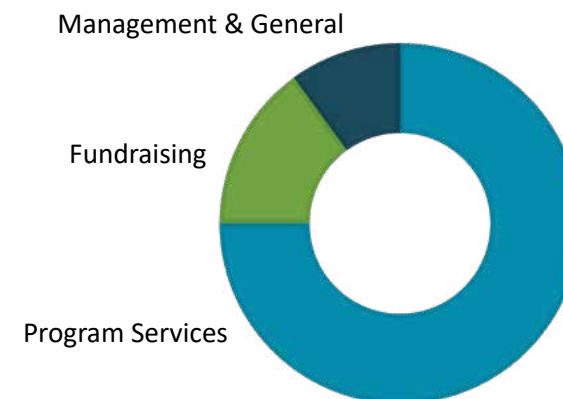
PRE-AUDITED FOR THE FISCAL YEAR ENDING JUNE 30TH, 2023



Revenue

Program Revenue	39%	\$739,905
Individuals & Businesses	31%	\$594,644
Foundations	21%	\$403,258
Local Governments	6%	\$109,732
Special Events	2%	\$28,828
Investments	1%	\$22,367
In-Kind Support	<1%	\$4,725

Total Revenue \$1,903,459



Expenses

Program Services	75%	\$1,615,699
Fundraising	15%	\$323,140
Management & General	10%	\$215,427

Total Expenses \$2,154,266

Teaching English The Intercambio Way,
through **mutual learning**, makes waves of
connections across cultures. Every dollar counts.



WITH ENDURING GRATITUDE

This Gratitude Report is dedicated to the donors,
volunteer teachers, and English learners who built connections
across cultures throughout the year.

JOIN US!

Want to be a part of our next Gratitude Report?

Join the more than **300** volunteers and over **400** individual donors who made this work possible over the last year! Thank you for the multitude of ways you choose to give to Intercambio.



Teach in
Boulder County



Volunteer
Online



Participate in a
Community
Conversation



Make Your
Year-End Donation



Join Our Monthly Giving
Scholarship Club

intercambio.org



203/251

GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization	<u>Louisville Community Food Bank</u>		
Program Title or "General Operating"	<u>LCFB</u>		
Contact Person	<u>Kim Echols</u>	Title	<u>No-Chair</u>
Address	<u>1025 Front Street Louisville 80027</u>		
Telephone	<u>303-356-0202</u>	E-Mail	<u>kechols558@comcast.net</u>
Program Duration (if applicable)	Begin <u>1975</u>	End	<u>current</u>
Anti-Discrimination Policy (Required)	Yes ☐	No ☒	Other <u> </u>
Grant Amount Requested for 2025 and/or 2026	\$ <u>2500 -</u>	\$ <u>3000 -</u>	

1. Organizational background: What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

For the past 60 years, the Mission of Louisville Community Food Bank (LCFB) has been to provide supplemental food and non-food items to Clients in the 80027 zip code.

LCFB works with the local schools and police and fire departments. Since the Marshall fire, LCFB has been a partner with Restoring Our Community (ROC). LCFB has provided food and supplies to ROC and continues to provide food and non-food to those affected.

Since January 2024, LCFB has provided food and non-food to 5 unhoused individuals.

2. Program description: What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

LCFB is open for food and non-food distribution every Tuesday, 9-Noon. It also provides quarterly deliveries in March, June, September and December to 20 shut-in families. LCFB is funded and operated solely by donations of food, money and volunteers. Food and non-food items are acquired through Community Food Share, Whole Foods in Superior, Chipotle food in Broomfield, food drives and purchases.

Operating expenses include food and supplies, rent, utilities and marketing.

Every Tuesday, clients can pick up a bag of non-perishables, meat, 1 gallon of milk, eggs, bread products and fresh produce. Clients are also encouraged to take items from our street-side tables.

3. Program measurements: Provide the following information for the program/activities for which funding is requested:

Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

LCFB's client base is mostly from Louisville and Superior. There are clients from Broomfield, East Boulder County, Lafayette and Longmont. There is outreach to Section 8 housing, Senior Center, schools in Louisville and Superior, police department, fire department and Chambers of Commerce.

Qualitative measures: How will you measure the success of this program/activity?

Success will be measured by continued distribution to those in need.

4.Evaluation: If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

Successes: LCFB has provided to clients for over 60 years, never turning away anyone. LCFB does not ask for proof of income.

There is a "help yourself" table and cart on the sidewalk for clients to "shop" for items they wouldn't normally think to ask for, drinks, baking supplies and items in large containers.

LCFB provided non-perishable foods to ROC and in turn, those affected by the fire were welcome to obtain more items.

Bridge House workers receive food from LCFB.

LCFB is proud to serve the dietary needs of clients – gluten-free, lactose intolerant, vegan and vegetarian.

Challenges: Five (5) unhoused clients have found our services, which is great; but they also have needs that we are unable to assist with.

LCFB has outgrown its available space and would like to partner with a sponsor for a larger space.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT
ORGANIZATIONS**

5. Leadership:

- How many people serve on your Board of Directors and how many of these are Louisville residents?

5 Louisville residents serve on the Board

- How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

0 – we are all volunteers

- Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.

All "help" is volunteer and majority are Louisville/Superior residents. Volunteers pick up, weigh and sort food from Community Food Share, Whole Foods, Chipotle and donations. They pack non-perishable bags and quarterly boxes, serve clients their needs and record clients for Community Food Share/Feeding America.

There have been approximately 2900 volunteer hours this past year.

- Who will be responsible for the administration of the program or service?

Kim Echols and Jay Holloway – Co Chairs

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

Community Food Share is our "parent" organization that also provides resources to Boulder and Broomfield Counties. Louisville Community Food Bank is the only food bank in Louisville/Superior.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

Louisville Community Food Bank has been a quiet, non-assuming not for profit, no questions asked food bank that has been an integral part of Louisville and East Boulder County for over 60 years. It would like to continue to offer food and non-food items and have the support of the Community.

Our needs continue to grow due to inflation, the unhoused, and joblessness along with the Marshall fire, XCEL power outage and housing expenses

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

[illegible]

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature

Jay Holloway
Agency Director

Agency Director

303 665-0776

Telephone Number

jay_holloway@msn.com

E-Mail Address

Signature

Kimberly Echols
Board President

Board President

303-356-0202

Telephone Number

kechols558@comcast.net

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.

Louisville Community Food Bank Board of Directors:

Kim Echols, co-chair, Volunteer
Jay Holloway, co-chair, Volunteer
Nancy Holloway, Treasurer, Volunteer
Larry Boven, Volunteer
Sheila Newton, Volunteer

Other Volunteers:

Gary Braddock
Cher Masini
Paul Masini
Iris Sherman
Pat Heinz-Prybl
Del Nishimoto
Daryl and Bob McCool
Jackson McCool
James Clemson
Valentyna Serhiienko
Diana Lee

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

DEPARTMENT OF THE TREASURY

Date:

APR 17 2017

LOUISVILLE COMMUNITY FOOD BANK
741 JEFFERSON AVE
LOUISVILLE, CO 80027-0000

Employer Identification Number:
82-1072636
DLN:
26053497001517
Contact Person:
CUSTOMER SERVICE ID# 31954
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
April 30
Public Charity Status:
509(a)(2)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
April 2, 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

Department of the Treasury
Internal Revenue Service

for Tax-Exempt Organization not Required to File Form 990 or 990-EZ

2023

Open to Public Inspection

A For the **2023** Calendar year, or tax year beginning **2023-05-01** and ending **2024-04-30**

B Check if available

☐ Terminated for Business☒ Gross receipts are normally \$50,000 or lessC Name of Organization: **LOUISVILLE COMMUNITY FOOD**
BANK**155 W SYCAMORE LN,**
louisville, CO, US, 80027D Employee Identification
Number **82-1072636**

E Website:

F Name of Principal Officer: **nancy holloway**
155 W SYCAMORE LN,
louisville, CO, US, 80027

Privacy Act and Paperwork Reduction Act Notice: We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to give us the information. We need it to ensure that you are complying with these laws.

The organization is not required to provide information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of the Form 990-N is covered in code section 6104.

The time needed to complete and file this form and related schedules will vary depending on the individual circumstances. The estimated average times is 15 minutes.

Note: This image is provided for your records only. Do Not mail this page to the IRS. The IRS will not accept this filing via paper. You must file your Form 990-N (e-Postcard) electronically.

GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

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Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization	<u>Impact on Education</u>		
Program Title or "General Operating"	<u>General Operating</u>		
Contact Person	<u>Katie DiMercurio</u>	Title	<u>Program Director</u>
Address	<u>721 Front St, Suite A</u>		
Telephone	<u>303-524-3865</u>	E-Mail	<u>katie@impactoneducation.org</u>
Program Duration (if applicable)	Begin	<u>N/A</u>	End
Anti-Discrimination Policy (Required)	Yes	☒	No ☐ Other
Grant Amount Requested for	2025	2026	
	<u>\$ 5000</u>	<u>\$ 5000</u>	

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. **Organizational background:** What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

Impact on Education (IOE) has provided programs that benefit Boulder Valley School District (BVSD) students since 1983. Our mission is to support BVSD students with supplemental funding and resources in order to address critical needs and opportunity gaps. IOE targets systemic barriers that impact students based on socioeconomic status, race, gender, class and other marginalized identities. Our programs span a variety of educational initiatives because inequities exist across the student experience. Our vision is an equitable future for public education across Boulder Valley's public schools.

IOE is unapologetically equity-focused in our work and committed to providing comprehensive and impactful support to ensure BVSD students receive excellent education. We exist to provide support and resources to students facing the most barriers to success. We recognize that racial equity can be a barrier to excellent education and prioritize investments toward students from historically marginalized communities. This work is critically important in a community like Boulder County where there is a high correlation between the opportunity gap, students of color, and students from low-income families. We verify our work through metrics and evaluation in all of our programs and investments.

2. **Program description:** What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

Career and College Pathways: IOE conducts a Career Readiness Academy, empowering at least 70 historically marginalized BVSD high school students through a series of after school workshops. We also support access to career and college pathways for under-resourced students by providing scholarships.

Academic Opportunity Fund: IOE provides \$180,000 in educator resources each year to ensure all classrooms have the resources to meet student and educator needs. These grants help to bridge opportunity gaps and level the playing field at all schools.

Learning Tools: Our Crayons to Calculators program distributes backpacks and supplies to 5,000 low-income students at the beginning of each school year. IOE also provides multicultural art supplies to every elementary school and middle school.

Early Childhood Education: IOE partners with BVSD to offer a comprehensive, full-day summer school program for rising kindergarteners each year. The program focuses on students who didn't attend preschool and students from historically marginalized communities and delivers a preview of the first month of kindergarten.

Mental Health: IOE provides mental health support during the school day by providing students access to mental health professionals who work across BVSD schools, offering educational events for parents and caregivers, and fully funding the creation and staffing of drop-in Wellness Centers in high schools.

3. **Program measurements:** Provide the following information for the program/activities for which funding is requested:

Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

IOE is the non-profit arm of BVSD, we serve all BVSD schools, including rising Kindergartners-12th graders and teachers and administrators across the district. Vital funding from the City of Louisville will help IOE deliver high-quality programming across Louisville's schools. Specifically we exist to support low-income and historically marginalized students in BVSD. There are around 7000 students who are signed up for free or reduced lunch in BVSD every year. Additionally, BVSD is made up of around 35% students of color. There are 3,836 BVSD students attending school in Louisville. Last school year, IOE directly delivered the following resources to Louisville schools and students:

- Support of a full-time mental health professional staffing the drop-in Wellness Center at Monarch High School. Over 25% of the school population utilized this resource and students left the center feeling better than they came in.
- \$12,820 in Academic Opportunity Fund money went to Louisville schools, this figure represents 8% of total AOF money distributed
- 7.4% of school supply distribution, Crayons to Calculators, went to supporting low-income students in Louisville schools
- Continued after school childcare coverage and transportation for Marshall fire affected families.

Qualitative measures: How will you measure the success of this program/activity?

IOE defines success through the impact of investments in our community. We use qualitative and quantitative data to drive investment decisions and our programs are evaluated regularly to ensure we're meeting the needs of our community. We rely on independent expert assessors to provide accurate and thorough program evaluations.

We recognize the importance of centering voices of all stakeholders and employ different strategies to ensure diverse perspectives inform every aspect of our program development, execution, and evaluation. IOE prioritizes inclusivity by actively seeking input from educators, students, district partners, parents, caregivers, and the broader community. We are intentional and committed to getting regular feedback from all of our stakeholders through parent, student, and educator surveys, program evaluation interviews, a student advisory board, a program advisory board, and relationships with other community organizations. Each avenue serves a different purpose for every investment that IOE makes.

4. **Evaluation:** If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

Each year our work shifts a little to meet the changing and evolving needs of our schools and students - this agility is one of our greatest strengths - but we consistently provide access to opportunities for students to learn and grow. Our 2023 Impact Report shares more details, but as an example, last year, we provided:

- 13,561 visits from 1875 students to six high school Wellness Centers offering mental health support during the school day
- Over\$154,000 in grants to 117 educators to bridge opportunity gaps and create a level playing field for their students
- After-school Career Readiness Academy workshops for 70 high school students to explore their interests and learning opportunities
- Four weeks of summer learning for 274 incoming BVSD students participating in Kinder Bridge
- School supplies and backpacks for 5,000 students facing financial hardship through Crayons to Calculators
- Community-wide recognition for 58 educators dedicated to public education
- Multicultural art supplies for 17,000 elementary and middle school students

We collaborate with BVSD on a regular basis to determine what the future needs of our students are. In addition, we complete an in-depth evaluation on all of our programs at least once a year.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

5. **Leadership:**

- How many people serve on your Board of Directors and how many of these are Louisville residents?

16 people serve on our Board of Directors, 2 of them are Louisville Residents

- How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

We employ 8 staff, 6 full-time staff and 2 part-time. We have 2 staff members who are Louisville residents.

- Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.

IOE relies heavily on generous donations of time and talent from our community members. We currently have over 170 volunteers who support our work and provide service to BVSD schools who request assistance. We estimate that our organization benefits from over 1000 hours of volunteer service each year.

- Who will be responsible for the administration of the program or service?

Our program director, Katie DiMercurio is responsible for the administration of all the programs that IOE runs. Our executive director, Allison Billings is responsible for oversight of funds.

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

IOE is the only organization – other than BVSD – that serves the entire BVSD student body of 28,000 students and 4,000 educators. We partner with a wide range of organizations and institutions to ensure that we deliver the most current and most engaging programming. Partnerships are integral to much of our work, allowing Impact on Education to most effectively use its limited resources and keep its overhead low while ensuring long-term sustainability.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

We appreciate the support from our City governments in ensuring that students receive an equitable and excellent public education. As the foundation for BVSD, we were founded to support underfunded schools. While schools are still underfunded, we have evolved to provide support for targeted programs that remove economic and learning barriers, increase equity among our students and close opportunity gaps. IOE invests 87% of our funds targeting systemic barriers that impact students based on socioeconomic status, race, gender, class, and other marginalized identities. We ensure that the 7,000 BVSD students from low-income households have access to equitable learning opportunities. Our programs span a variety of educational initiatives because inequities exist across the student experience.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Individuals	\$526,874	19.4%
Businesses	\$195,119	7.2%
Foundations	\$891,184	32.8%
Government	\$134,992	5%
Endowment	\$600,000	22.2%
Events	\$364,109	13.4%

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature


Allison (Impact) (Sep 9, 2024 16:15 MDT)

Agency Director

303-524-3865

Telephone Number

allison@impactoneducation.org

E-Mail Address

Signature


Cathleen Kendall (Sep 9, 2024 16:39 MDT)

Board President

303-517-7067

Telephone Number

cathleenkendall@gmail.com

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.



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

IMPACT ON EDUCATION
721 FRONT ST APT A
LOUISVILLE, CO 80027

Date: November 13, 2023
Employer ID number: 84-0943046
Form 990 required: Yes
Person to contact: Name: Mr. Meyer
ID number: 0194918

Dear Sir or Madam:

We're responding to your request dated September 27, 2023, about your tax-exempt status.

We issued you a determination letter in September 1984, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax-deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period.

- Form 990, Return of Organization Exempt From Income Tax
- Form 990-EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements



ACCESSIBLE, ENGAGING AND EQUITABLE EDUCATION
2023 IMPACT REPORT

222/251

OUR VISION

An equitable future for public education across Boulder Valley's public schools.

We equalize opportunity, bolster academic success, and galvanize community engagement to create lasting change. Through our investments, we address systemic barriers that impact students based on socioeconomic status, race, gender, class and other marginalized identities.

THE OPPORTUNITY GAP

When uncontrollable factors impact student academic success, we call this the opportunity gap.

BVSD has one of the widest opportunity gaps in the State of Colorado. And that's why we prioritize programs and investments that support families with low-income and historically marginalized students.

Our work provides students access to excellent and equitable education.

Did you know Colorado spends \$3,087 below the national average per student?

OUR MISSION

To support Boulder Valley public school students with community funding and resources in order to meet critical needs and eliminate opportunity gaps.

Our 2023 investment

\$2,500,000

223/251



BVSD spans 11 different communities and includes:

28,000

STUDENTS

56

SCHOOLS

4,000

EDUCATORS

We invest in a broad range of programs to help ensure students facing barriers to success have access to the same learning opportunities as their peers.



“ We believe every student in our community deserves access to public education. Impact on Education knows how to find the most efficient and impactful ways to provide students with the opportunities and resources they need.

– Jessica & Matt Benjamin

Learn about our 40-year history, our strong partnership with Boulder Valley School District, and how your gift will increase equity in our public schools.

Scan the code or visit:
impactoneducation.org/give

224/251



COLLEGE & CAREER READINESS OPPORTUNITIES



CAREER READINESS ACADEMY

Through after-school workshops 10th grade students received training and resources to empower them for success after graduation. Students explored their interests and learning opportunities available for them to pursue in high school and beyond.

60

STUDENTS

24

WORKSHOPS

3

SCHOOLS

On behalf of generous families and community organizations committed to supporting public education, we awarded **\$25,000 in scholarships** to 21 BVSD graduates.



We covered test fees that allow bilingual high school students to earn up to 16 college credits.

Students who pass the test also become eligible for Colorado Department of Education's ASCENT program, which offers a free year of college tuition.



225/251



EARLY CHILDHOOD EDUCATION

KINDER BRIDGE

Our summer enrichment program was offered at Emerald, Whittier, and Lafayette elementaries, and Monarch PK-8. Transportation, school supplies, and nutritious meals were provided, along with a preview of the first month's curriculum and lessons on healthy behaviors and social-emotional well-being.

160

STUDENTS

105

LEARNING HOURS

4

LOCATIONS

"They're riding the bus, they're getting a full day. They are going to specials. They get to learn how to stand in line and how to walk from their classroom to the lunchroom and how to put their stuff away in their cubby. **I saw a lot of growth in school readiness.**"

– Lead BVSD Educator, Kinder Bridge

WOW! Children's Museum brought a "Romping Stomping Dinosaurs" program to each site and welcomed parents to participate, helping their little learners practice counting and comparing.

226/251

In partnership with **Parent Possible**, families were encouraged to download the Vroom app which offers science-based activities that boost children's brain development and help prepare them for school.

COMMUNITY CONVERSATION



15

SPEAKERS

250

ATTENDEES

1000

VIDEO VIEWS



We gathered clinicians, health professionals, educators and people with lived experiences, for **a conversation on youth mental health.**

The event discussed challenges facing youth today, offering tips and resources for parents. Recordings are available in English and Spanish.

MENTAL HEALTH STAFF



4

STAFF

6,282

STUDENTS HAVE ACCESS

Impact on Education funding enables mental health staff in BVSD to support the students and schools most impacted by the Marshall Fire.

These positions saw 4,640 students during the 2022-23 school year and provided 1,025 consults to students, families and staff.

This year Impact on Education committed over \$1,200,000 to provide 227/251

During the first three months of the 2023-24 school year, BVSD students made over 6,150 visits to BVSD Wellness Centers to relax, refocus and seek support.

42% OF STUDENTS

reported feeling so sad or hopeless regularly for at least a two-week period that they stopped doing their normal daily activities.

2021, Centers for Disease Control & Prevention



WELLNESS CENTERS



7,441

STUDENTS HAVE ACCESS

6

SCHOOLS

We're funding six high school Wellness Centers because we believe they're powerful tools for supporting our youth and helping them thrive.

Each Wellness Center provides students with an accessible, safe space on their school campus that offers mental health support and promotes social-emotional wellness.

the BVSD community access to mental health support and resources.

228/251

RESOURCES FOR EDUCATORS

ACADEMIC OPPORTUNITY FUND

\$133,000

AWARDED

117

GRANTS

Awarding grants to educators and schools helps bridge opportunity gaps and create a level playing field for all BVSD students.

These grants are **a valuable resource for learning**. We prioritize requests that expand access to resources, opportunities, and support for students from marginalized and underserved communities.



VOLUNTEER SPOTLIGHT



"It's remarkable to see the ingenuity and passion BVSD educators bring to their grant applications, **all in the pursuit of enriching their students' educational journeys**. I volunteer to review grants because I believe they're a vote of confidence for our teachers and can uplift the entire school community.

229/251

– Laura Arentsen



2023 Blake Peterson
Lifetime Achievement Award

GLEN EINREM

ICAN Paraeducator
Monarch High School



2023 Imogene Maxon
Early Educator Award

SUE CROWLEY

4th Grade Teacher
Alicia Sanchez Elementary

This year's Impact Awards was the 30th annual community-wide celebration, and we honored an educator from every BVSD school.

When we use the word educator, we're referring to classroom teachers, custodians, office managers, food service employees, crossing guards, volunteers — anyone whose work engages and enriches the lives of students.

The Impact Awards are one way we're supporting and encouraging every educator in BVSD to continue doing what they do best.

230/251

EMPOWERING EDUCATORS

**IMPACT
AWARDS**



CRAYONS TO CALCULATORS BVSD



BVSD students facing financial hardship received school supplies and a new backpack at the beginning of the school year.

5,000

STUDENTS IMPACTED

LEARNING TOOLS

MULTICULTURAL ART SUPPLIES



We provided multicultural art supplies to each elementary classroom and middle school art room across BVSD.

24

SKIN TONES

17,000

STUDENTS

VOLUNTEER SPOTLIGHT



“ I was honored to be part of this initiative because it enriches the lives of BVSD students. **It's more than just giving them tools to draw and create**; it's about affirming their identities, celebrating their uniqueness, and fostering an inclusive environment where every child feels seen and valued. ”

231/251 – Jann Oldham



JOIN US

WAYS YOU CAN HELP

MONTHLY GIVING

Join a dedicated group of supporters, our Compass Club, by setting up a monthly gift that powers public education. Recurring gifts support our work year-round.

PLANNED GIVING

When you make a planned gift to Impact on Education you **become a member of our Legacy Society**. Your future gift allows us to plan for growth, assure sustainability and extend commitment to equitable public education to the next generation of students and educators.

Planned gifts include bequests, gifts from a retirement account or insurance policy, creating a charitable trust, or gifts of real estate or other tangible property.

To learn more: development@impactoneducation.org

AMPLIFY OUR VOICE

Forward our monthly newsletter, engage with us on social media and share the important work we're doing.

232/251

It takes all of us working together to provide students in Boulder Valley School District access to excellent and equitable education.

CATALYST PARTNERS



TRAILBLAZING PARTNERS



Make a secure gift online

impactoneducation.org/give



Thank you to our dedicated supporters. We couldn't do this important work without you! It's because of you that we're able to ensure students have access to the resources they need, when they need them.



721 Front St, Ste A, Louisville, CO 80027 | 303-524-3865

SUBJECT: 2025/2026 BUDGET UPDATE

DATE: SEPTEMBER 19, 2024

**PRESENTED BY: SAMMA FOX, INTERIM CITY MANAGER
RYDER BAILEY, CPA, FINANCE DIRECTOR
MAHYAR MANSURABADI, FINANCIAL ANALYST**

SUMMARY:

The Finance Director will provide an update on the 2025/2026 Budget this meeting.

This update will include the latest Long Term Financial Forecasts (LTFFs) for the following funds;

- o General Fund
- o Open Space
- o Parks
- o Recreation
- o Capital
- o Consolidated Utility; and
- o Golf

The update will also include the latest on Sales and Property Tax forecasts and assumptions, and the 2025 – 2030 Capital Improvements Plan. Lastly, CMO will provide an update on existing budgeted funding for Citywide Equity, Diversity and Inclusion.

BACKGROUND:

Links Previous Budget materials:

To date, the City has held three public meetings on the 2025/26 Budget, on each of the following dates. All materials are found on our City website, links below.

- Tuesday, July 24th – Budget Retreat
 - o [Link to Materials](#)
- Thursday, August 15th (Finance Committee Meeting)
 - o [Link to Materials](#)
- Tuesday, September 3rd – Budget Special Meeting
 - o [showdocument \(louisvilleco.gov\)](#)

There are three additional future public meetings scheduled on the 2025/26 Budget on the following dates:

- Tuesday, October 1st – (Council Meeting) – City Manager's Recommended Budget Presentation
- Tuesday, October 15th – (Council Meeting) – Budget Public Hearing
- Monday, November 4th – (Council Meeting) – 2025/26 Budget Adopted

Staff will be available to facilitate a Budget discussion and answer questions.

SUBJECT: REVENUE, SALES AND BAG TAX REPORTS - July 2024

DATE: SEPTEMBER 19, 2024

PRESENTED BY: TRAVIS ANDERSON, REVENUE AND TAX MANAGER, JESS ZEAS, SALES TAX ACCOUNTANT/AUDITOR, MELISSA LUNDGREN CPA, CFE, SALES TAX ACCOUNTANT/AUDITOR II

SUMMARY:

Sales and Use Tax Collection Report – July 2024

Sales Tax: Increase MoM (July 2024 vs July 2023) by 12.8% for a total amount collected of \$1,944,79. IN-city businesses generated \$1,022,123, an decrease of \$49,877 or 4.7%. Outside city businesses generated \$922,655, an increase of \$270,879 or 41.6%.

YTD Cumulative Performance: Year-to-date, sales tax revenue is below budget by 2.7% (\$359,068). However, compared to the same period in 2023, revenue has increased by 6.2% (\$751,296), resulting in a year-over-year growth for all taxes combined of 13.7%.

Consumer Use Tax: Consumer use tax collections for June 2024 amounted to \$134,428, reflecting purchases brought into the city without the corresponding sales tax.

Audit Tax: Audit tax collections for June 2024 totaled \$11,209.

RECOMMENDATION:

Receive and file.

CITY OF LOUISVILLE

Cumulative Revenue History Report

Sales Tax

Through Month	Cumulative Budget	Cumulative Sales Tax - 2024	Cumulative Budget Var. %	Cumulative Sales Tax - 2023	Cumulative Var. % to PY
JANUARY	1,629,000	1,694,541	4.0%	1,568,367	8.0%
FEBRUARY	3,133,000	3,203,905	2.3%	3,108,097	3.1%
MARCH	5,281,000	5,356,409	1.4%	5,138,343	4.2%
APRIL	7,080,000	7,043,090	-0.5%	6,614,626	6.5%
MAY	8,975,000	8,774,925	-2.2%	8,455,656	3.8%
JUNE	11,367,000	11,009,153	-3.1%	10,478,860	5.1%
JULY	13,313,000	12,953,932	-2.7%	12,202,636	6.2%
AUGUST	15,275,000			13,852,094	
SEPTEMBER	17,466,000			15,699,736	
OCTOBER	19,372,000			17,259,776	
NOVEMBER	21,164,000			18,820,535	
DECEMBER	24,099,000			21,404,481	

Budgeted increase from last year's Actual Sales Tax **12.6%**

Other Taxes - Combined

Through Month	Cumulative Budget	Cumulative Use, Building, Auto, Lodging & Bag Tax - 2024	Cumulative Budget Var. %	Cumulative Use, Building, Auto, Lodging & Bag Tax - 2023	Cumulative Var. % to PY
JANUARY	582,583	536,250	-8.0%	560,385	-4.3%
FEBRUARY	1,165,167	1,000,218	-14.2%	993,191	0.7%
MARCH	1,747,750	1,649,250	-5.6%	1,677,120	-1.7%
APRIL	2,330,333	2,142,669	-8.1%	2,793,349	-23.3%
MAY	2,912,916	2,572,092	-11.7%	3,225,840	-20.3%
JUNE	3,495,500	5,225,545	49.5%	3,788,383	37.9%
JULY	4,078,083	6,413,208	57.3%	4,827,504	32.8%
AUGUST	4,660,666			5,217,016	
SEPTEMBER	5,243,249			5,690,526	
OCTOBER	5,825,833			6,211,504	
NOVEMBER	6,408,416			6,839,569	
DECEMBER	6,990,999			7,651,768	

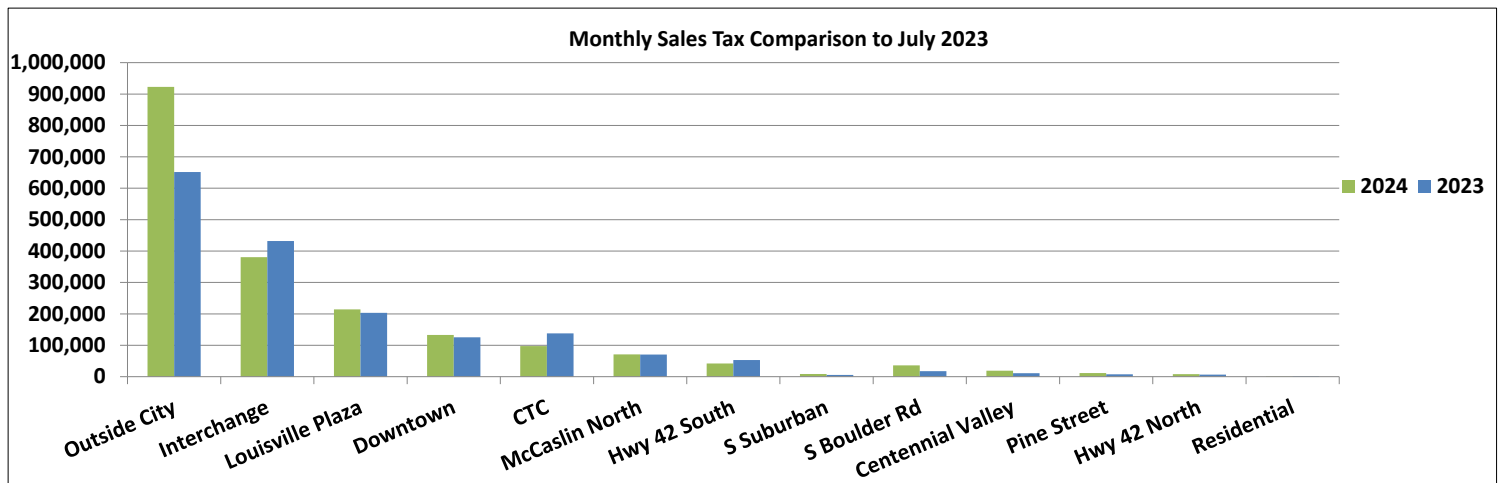
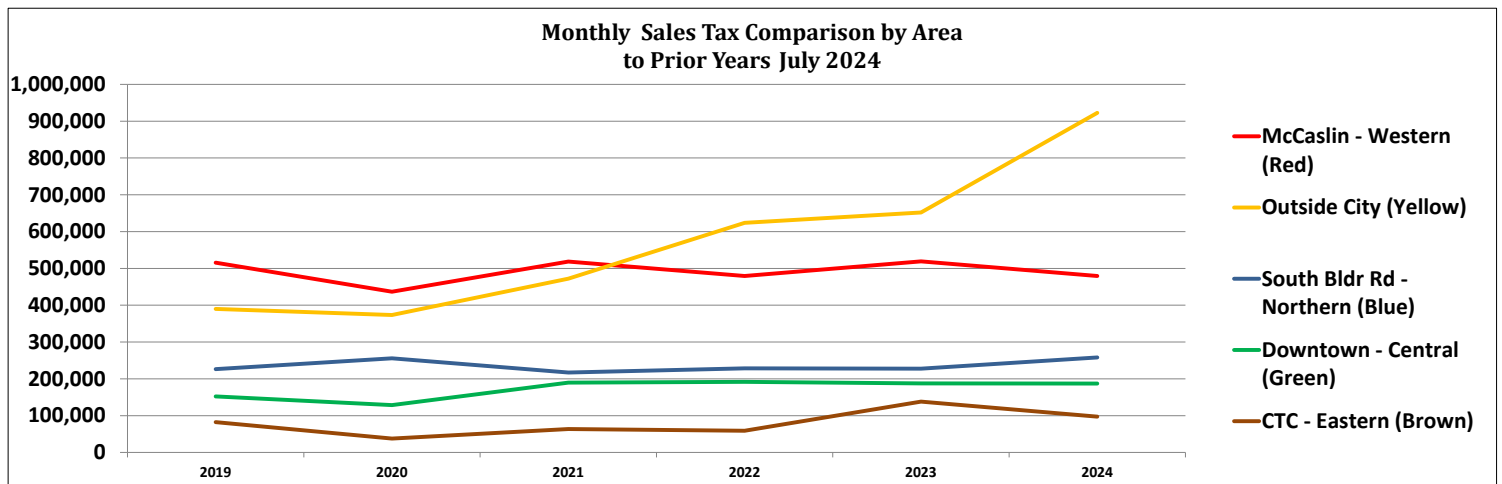
All Taxes - Combined

Through Month	Cumulative Budget	Cumulative All Tax Revenue - 2024	Cumulative Budget Var. %	Cumulative All Tax Revenue - 2023	Cumulative Var. % to PY
JANUARY	2,211,583	2,230,791	0.9%	2,128,752	4.8%
FEBRUARY	4,298,167	4,204,122	-2.2%	4,101,288	2.5%
MARCH	7,028,750	7,005,660	-0.3%	6,815,464	2.8%
APRIL	9,410,333	9,185,759	-2.4%	9,407,975	-2.4%
MAY	11,887,916	11,347,017	-4.5%	11,681,497	-2.9%
JUNE	14,862,500	16,234,698	9.2%	14,267,243	13.8%
JULY	17,391,083	19,367,139	11.4%	17,030,140	13.7%
AUGUST	19,935,666			19,069,110	
SEPTEMBER	22,709,249			21,390,262	
OCTOBER	25,197,833			23,471,280	
NOVEMBER	27,572,416			25,660,104	
DECEMBER	31,089,999			29,056,248	

CITY OF LOUISVILLE											
Revenue History 2020 through 2024											
YEAR	MONTH	SALES TAX MO. BUDGET	SALES TAX	VAR. %	USE TAX	BLDG USE TAX	AUTO USE TAX	LODGING TAX	AUDIT	Bag Tax	TOTAL
2024											
	JANUARY	1,629,000	1,694,541	4.0%	231,929	113,184	172,085	19,052	-	-	2,230,791
	FEBRUARY	1,504,000	1,509,364	0.4%	119,255	176,535	151,369	16,768	-	41	1,973,331
	MARCH	2,148,000	2,152,505	0.2%	204,957	242,799	120,150	40,658	9,269	31,199	2,801,538
	APRIL	1,799,000	1,686,680	-6.2%	106,868	175,582	160,095	27,918	21,152	1,805	2,180,099
	MAY	1,895,000	1,731,835	-8.6%	144,957	3,236	164,151	80,600	36,418	60	2,161,258
	JUNE	2,392,000	2,234,228	-6.6%	271,578	1,926,072	131,978	51,593	242,860	29,372	4,887,681
	JULY	1,946,000	1,944,779	-0.1%	134,428	790,889	190,082	61,022	11,209	33	3,132,442
	AUGUST	1,962,000									
	SEPTEMBER	2,191,000									
	OCTOBER	1,906,000									
	NOVEMBER	1,792,000									
	DECEMBER	2,935,000									
	YTD TOTALS	13,313,000	12,953,932	-2.7%	1,213,971	3,428,297	1,089,910	297,611	320,910	62,509	19,367,139
	2024 Adjusted Budget	24,099,000	24,099,000		3,239,333	1,548,333	1,700,333	403,000	-	100,000	31,089,999
	YTD Variance % to Prior Year	12.6%	6.2%		-47.7%	198.0%	8.7%	32.8%	11720.8%	-50.4%	13.7%
2023											
	JANUARY		1,568,367		155,955	238,897	157,506	8,027	-	-	2,128,752
	FEBRUARY		1,539,730		208,668	99,366	106,393	15,663	2,715	-	1,972,536
	MARCH		2,030,246		223,743	219,554	157,285	12,178	-	71,169	2,714,176
	APRIL		1,476,283		774,627	100,712	215,093	25,843	-	(46)	2,592,512
	MAY		1,841,030		154,813	100,612	130,404	46,617	-	46	2,273,522
	JUNE		2,023,204		223,473	101,731	129,621	55,112	-	52,606	2,585,746
	JULY		1,723,776		580,457	289,594	106,004	60,716	-	2,351	2,762,896
	AUGUST		1,649,459		84,672	105,041	156,199	43,180	-	419	2,038,970
	SEPTEMBER		1,847,642		223,587	43,341	119,898	52,083	-	34,601	2,321,151
	OCTOBER		1,560,040		98,476	174,305	201,959	44,457	-	1,782	2,081,018
	NOVEMBER		1,560,759		336,826	93,138	167,370	29,255	799	677	2,188,824
	DECEMBER		2,583,946		373,162	115,007	188,882	20,146	72,904	42,098	3,396,144
	YTD TOTALS		21,404,481		3,438,458	1,681,299	1,836,613	413,278	76,418	205,702	29,056,248
	Totals Post BAP Refund		21,299,674		3,123,008	1,681,299	1,836,613	413,278	76,418	205,702	28,635,991
	2023 Adjusted Budget		22,050,630		2,625,630	1,030,780	2,040,910	373,660		200,000	28,321,610
	Budget vs Actual Variance		-3.4%		18.9%	63.1%	-10.0%	10.6%		2.9%	1.1%
	YTD Variance *Post BAP		6.9%		17.8%	-55.5%	-3.3%	31.3%	21.6%	8.9%	-0.5%
	YTD Variance % to Prior Year		7.4%		29.7%	-55.5%	-3.3%	31.3%	21.6%	8.9%	1.0%
2022											
	JANUARY		1,290,514		176,432	130,345	128,149	3,109	208		1,728,758
	FEBRUARY		1,190,326		193,090	51,720	119,067	6,032	14,265		1,574,500
	MARCH		1,873,155		194,188	116,141	239,724	15,574	17,376	46,850	2,503,008
	APRIL		1,716,488		166,822	103,279	171,550	21,231	2,336		2,181,706
	MAY		1,596,606		141,953	156,057	162,552	37,751	817		2,095,736
	JUNE		1,977,923		363,695	166,434	145,676	30,068	-	50,020	2,683,797
	JULY		1,582,397		282,381	250,332	133,511	47,010	12,466		2,308,096
	AUGUST		1,732,722		170,194	577,453	169,804	63,940	8,651		2,722,763
	SEPTEMBER		1,769,359		333,062	1,252,503	155,205	22,131	-	46,134	3,578,394
	OCTOBER		1,469,642		176,355	329,917	214,840	42,562	15		2,233,332
	NOVEMBER		1,368,473		102,994	61,392	134,481	10,985	-		1,678,325
	DECEMBER		2,355,727		350,061	582,602	123,871	14,445	6,724	45,940	3,479,370
	YTD TOTALS		19,923,333		2,651,227	3,778,176	1,898,431	314,836	62,857	188,944	28,767,785
	2022 Adjusted Budget		20,145,920		2,386,940	1,532,520	1,914,660	319,480		101,250	26,400,770
	Budget vs Actual Variance		-1.1%		11.1%	146.5%	-0.8%	-1.5%		86.6%	9.0%
	YTD Variance % to Prior Year		9.1%		27.0%	54.8%	5.1%	16.0%	-33.9%		15.3%
2021											
	JANUARY		1,093,893		151,922	76,766	165,964	8,893	13,085		1,510,523
	FEBRUARY		1,048,733		123,647	175,248	141,326	9,311	9,343		1,507,607
	MARCH		1,473,421		187,196	497,955	118,578	12,589	1,431		2,291,171
	APRIL		1,447,875		92,613	880,417	156,795	13,198	3,434		2,594,332
	MAY		1,463,795		142,433	69,429	145,625	17,757	14,572		1,853,611
	JUNE		1,836,453		206,969	39,899	182,192	26,986	5,542		2,298,042
	JULY		1,460,976		121,088	(32,980)	144,891	38,956	15,499		1,748,430
	AUGUST		1,372,626		152,120	152,949	160,162	40,187	2,490		1,880,534
	SEPTEMBER		1,641,416		215,222	45,706	163,655	31,783	13,666		2,111,448
	OCTOBER		1,534,805		152,057	164,302	148,773	34,618	12,142		2,046,696
	NOVEMBER		1,503,261		162,041	156,565	144,254	23,667	1,145		1,990,933
	DECEMBER		2,377,087		379,832	214,495	134,883	13,526	2,814		3,122,637
	YTD TOTALS		18,254,341		2,087,139	2,440,753	1,807,098	271,471	95,163		24,955,964
	2021 Adjusted Budget		16,007,490		1,709,960	1,896,860	1,497,390	227,360			21,339,060
	Budget vs Actual Variance		14.0%		22.1%	28.7%	20.7%	19.4%			16.9%
	YTD Variance % to Prior Year		16.9%		39.3%	43.3%	19.3%	48.7%	-79.1%		19.0%
2020											
	JANUARY		1,146,885		139,124	167,476	143,490	20,259	10,328		1,627,562
	FEBRUARY		1,010,556		181,982	213,379	138,820	18,916	62,695		1,626,348
	MARCH		1,453,347		128,050	101,197	68,233	17,511	33,347		1,801,683
	APRIL		1,043,220		102,057	369,619	61,493	4,291	56,334		1,637,014
	MAY		1,104,718		86,298	182,958	52,846	7,772	34,308		1,468,899
	JUNE		1,620,670		135,567	62,081	152,603	13,238	126,571		2,110,730
	JULY		1,231,987		76,551	53,104	160,605	20,902	7,733		1,550,883
	AUGUST		1,176,398		83,836	53,404	155,256	24,833	26,419		1,520,146
	SEPTEMBER		1,500,877		105,141	136,333	145,388	18,154	48,695		1,954,587
	OCTOBER		1,274,200		123,011	36,568	192,352	17,622	7,756		1,651,508
	NOVEMBER		1,137,481		83,349	218,216	100,847	10,177	35,354		1,585,423
	DECEMBER		1,920,601		252,875	109,363	142,948	8,882	5,392		2,440,062
	YTD TOTALS		15,620,940		1,497,840	1,703,698	1,514,880	182,557	454,931		20,974,845
	2020 Adjusted Budget		14,616,360		1,189,540	1,895,060	1,041,660	181,890			18,924,510
	Budget vs Actual Variance		6.9%		25.9%	-10.1%	45.4%	0.4%			10.8%
	YTD Variance % to Prior Year		-2.9%		-12.9%	-18.4%	-12.7%	-59.9%	-67.1%		-10.6%

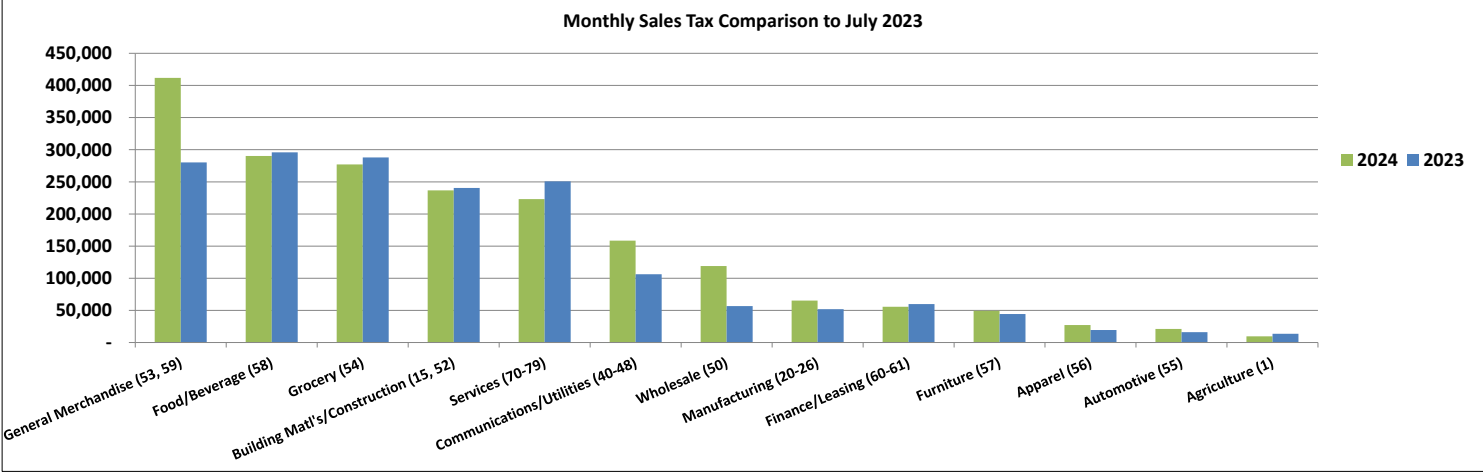
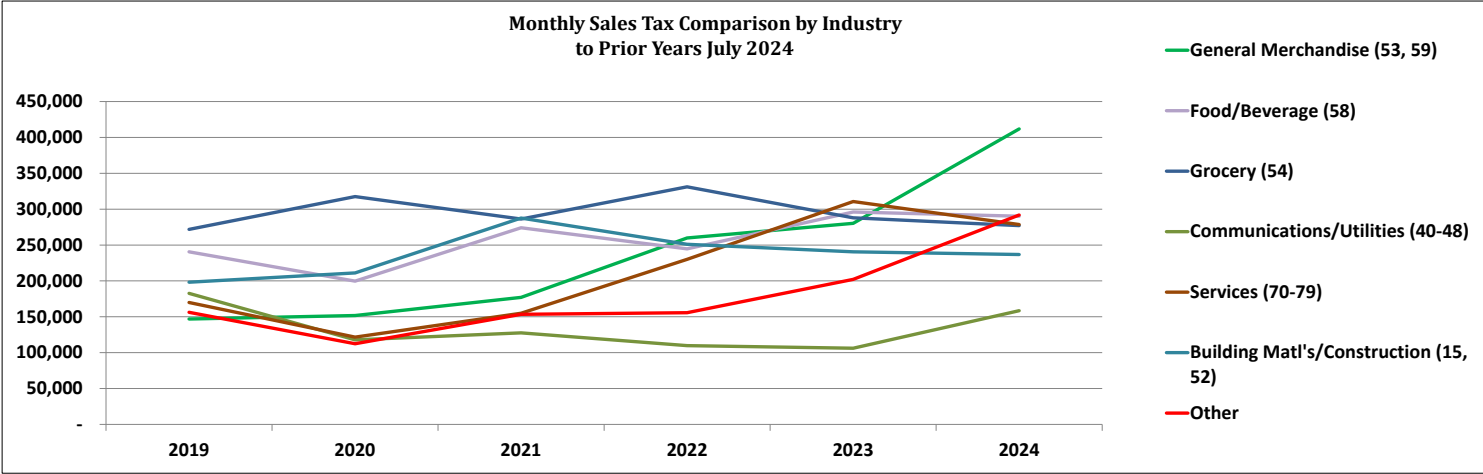
Monthly Sales Tax Revenue Comparisons by Area (July 2024)

AREA NAME	2019 Actual	2020 Actual	2021 Actual	2022 Actual	2023 Actual	2024 Actual	% Of Total	% Change
Outside City	389,841	373,395	471,983	623,939	651,776	922,655	47.4%	41.6%
Interchange	433,546	362,162	429,709	405,296	431,854	380,610	19.6%	-11.9%
Louisville Plaza	178,727	185,640	193,621	196,843	203,346	214,077	11.0%	5.3%
Downtown	112,499	82,808	134,975	130,830	125,319	132,821	6.8%	6.0%
CTC	82,317	37,677	63,558	58,984	138,069	97,260	5.0%	-29.6%
McCaslin North	67,955	66,777	79,339	67,567	70,423	70,915	3.6%	0.7%
Hwy 42 South	30,930	37,111	46,940	49,378	52,979	41,958	2.2%	-20.8%
S Suburban	5,160	3,697	5,124	4,807	5,772	8,700	0.4%	50.7%
S Boulder Rd	40,693	63,325	18,020	23,785	17,619	36,031	1.9%	104.5%
Centennial Valley	8,885	4,052	4,370	1,671	11,075	19,255	1.0%	73.9%
Pine Street	8,628	6,720	6,835	5,618	7,510	11,743	0.6%	56.4%
Hwy 42 North	6,910	6,648	5,471	7,741	6,471	7,953	0.4%	22.9%
Residential	104	1,974	1,031	5,938	1,562	800	0.0%	-48.8%
Total Revenue	1,366,196	1,231,987	1,460,976	1,582,397	1,723,776	1,944,779		
% Of Change	9.5%	-9.8%	18.6%	8.3%	8.9%	12.8%		



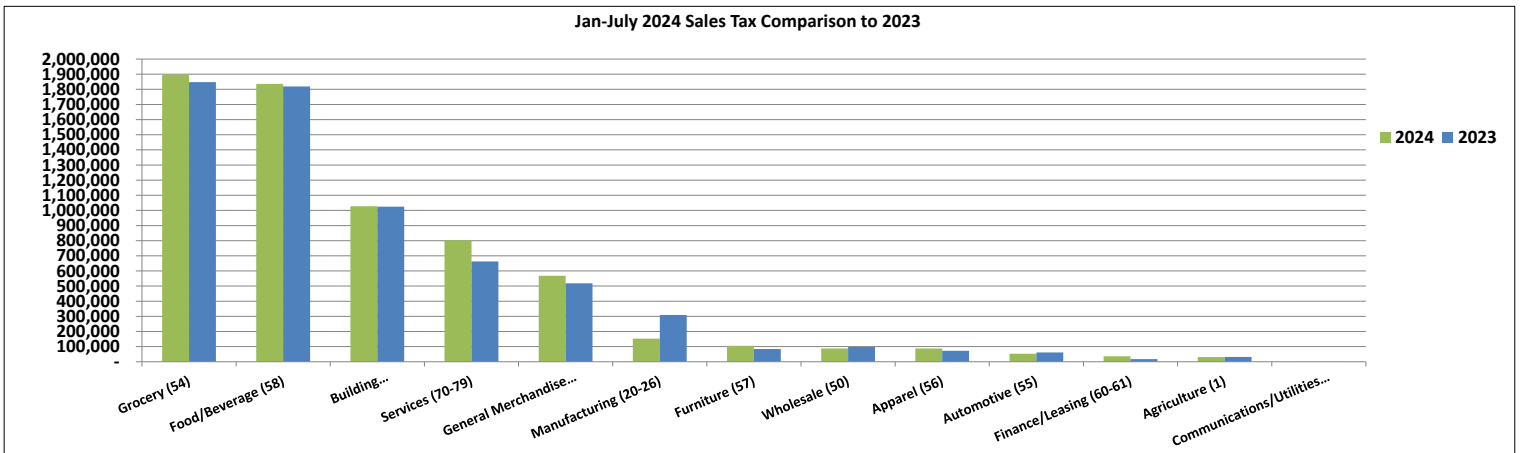
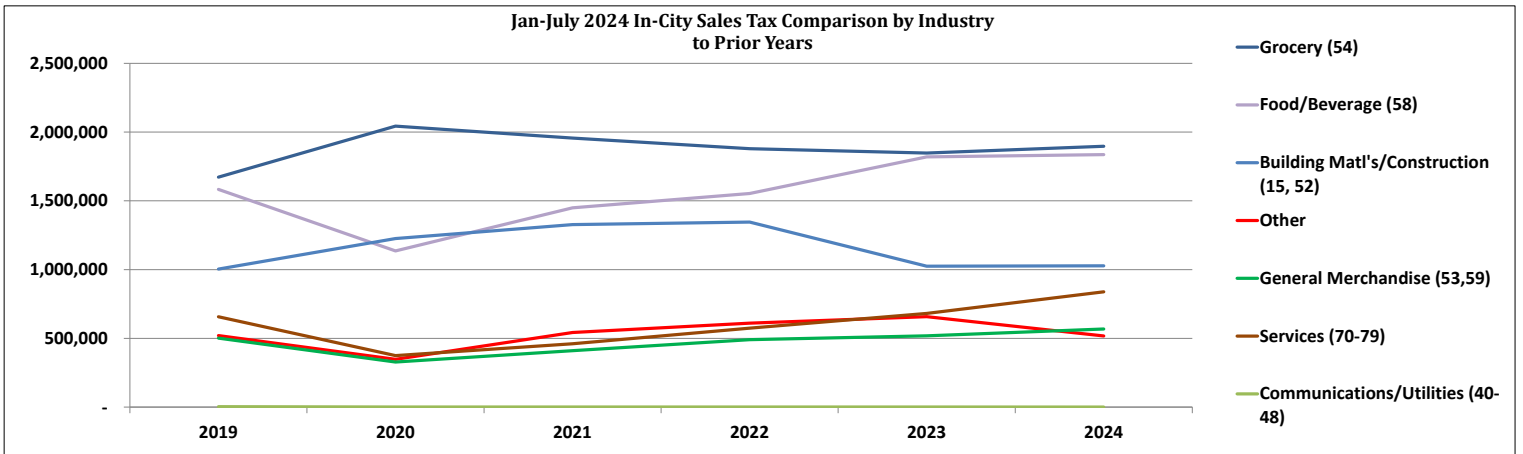
Monthly Sales Tax Revenue Comparisons by Industry (July 2024)

AREA NAME	2019 Actual	2020 Actual	2021 Actual	2022 Actual	2023 Actual	2024 Actual	% Of Total	% Change
General Merchandise (53, 59)	146,897	151,836	177,005	259,927	280,289	411,842	21.2%	46.9%
Food/Beverage (58)	240,546	199,691	274,135	244,663	296,011	290,259	14.9%	-1.9%
Grocery (54)	271,796	317,515	286,288	331,127	288,017	277,010	14.2%	-3.8%
Building Matl's/Construction (15, 52)	198,183	211,091	287,590	251,049	240,506	236,814	12.2%	-1.5%
Services (70-79)	138,324	87,636	123,562	131,414	250,819	223,038	11.5%	-11.1%
Communications/Utilities (40-48)	182,645	117,787	127,638	109,881	106,188	158,429	8.1%	49.2%
Wholesale (50)	24,117	31,219	28,888	45,516	56,664	119,038	6.1%	110.1%
Manufacturing (20-26)	85,781	26,596	52,416	44,828	51,902	65,288	3.4%	25.8%
Finance/Leasing (60-61)	31,631	34,012	31,411	98,555	59,812	55,533	2.9%	-7.2%
Furniture (57)	24,329	33,119	39,172	27,607	44,418	49,434	2.5%	11.3%
Apparel (56)	9,868	8,032	16,202	18,776	19,414	27,268	1.4%	40.5%
Automotive (55)	7,918	8,996	8,465	11,729	16,075	21,188	1.1%	31.8%
Agriculture (1)	4,162	4,459	8,205	7,323	13,660	9,637	0.5%	-29.4%
Totals	1,366,196	1,231,987	1,460,976	1,582,397	1,723,776	1,944,779		
% Of Change	9.5%	-9.8%	18.6%	8.3%	8.9%	12.8%		



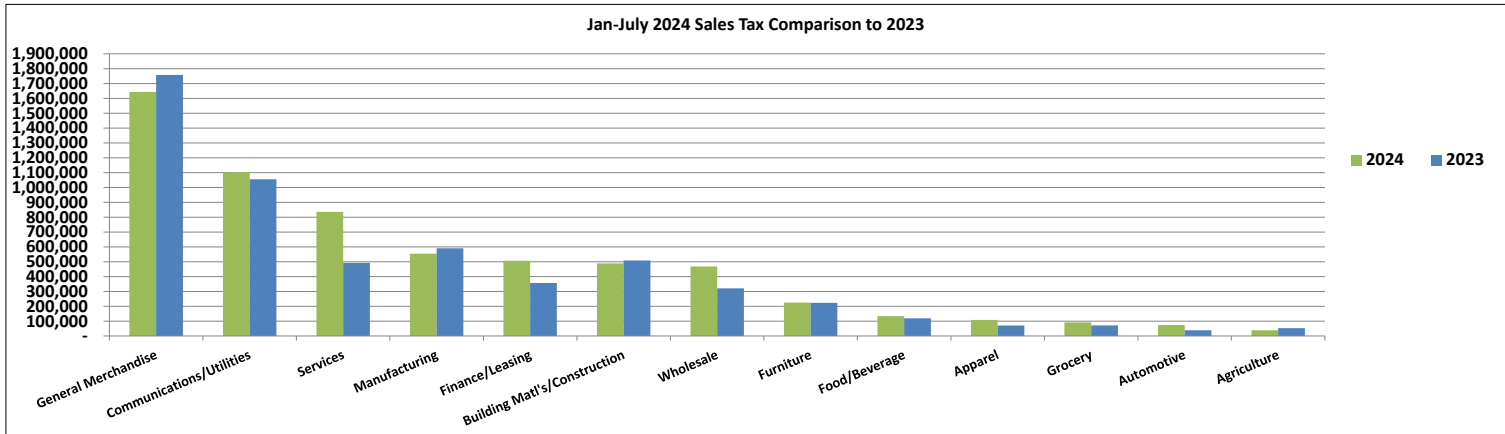
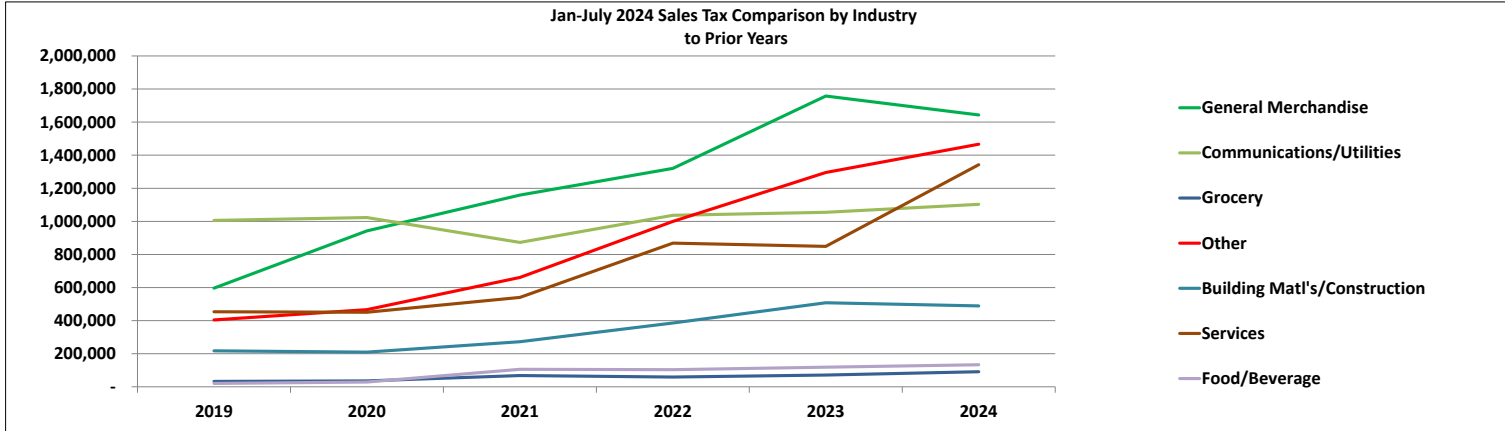
Sales Tax Revenue Comparisons by Industry - Inside City Area (Jan-July 2024)

INDUSTRY NAME	2019 Actual	2020 Actual	2021 Actual	2022 Actual	2023 Actual	2024 Actual	% Of Total	% Change
Grocery (54)	1,672,387	2,043,502	1,956,486	1,879,083	1,847,959	1,897,329	28.4%	2.7%
Food/Beverage (58)	1,583,517	1,135,819	1,449,536	1,553,376	1,819,385	1,836,303	27.5%	0.9%
Building Mat'l's/Construction (15, 52)	1,003,672	1,225,874	1,327,150	1,345,605	1,024,429	1,027,631	15.4%	0.3%
Services (70-79)	627,198	398,224	454,182	566,385	663,129	802,188	12.0%	21.0%
General Merchandise (53,59)	501,794	327,727	410,207	490,674	518,176	568,001	8.5%	9.6%
Manufacturing (20-26)	279,839	131,794	276,066	280,034	309,394	152,996	2.3%	-50.5%
Furniture (57)	71,888	56,892	69,854	67,361	84,669	105,345	1.6%	24.4%
Wholesale (50)	49,273	47,090	58,970	87,297	97,883	87,750	1.3%	-10.4%
Apparel (56)	47,158	36,109	53,395	65,696	72,746	87,539	1.3%	20.3%
Automotive (55)	39,618	46,297	50,445	77,822	61,372	52,803	0.8%	-14.0%
Finance/Leasing (60-61)	29,433	(23,756)	6,522	8,096	17,647	36,244	0.5%	105.4%
Agriculture (1)	32,198	29,254	33,561	32,328	31,589	30,732	0.5%	-2.7%
Communications/Utilities (40-48)	3,000	358	241	245	374	226	0.0%	-39.5%
Totals	5,940,975	5,455,186	6,146,616	6,454,002	6,548,752	6,685,087		
% Of Change	-3.0%	-8.2%	12.7%	5.0%	1.5%	2.1%		



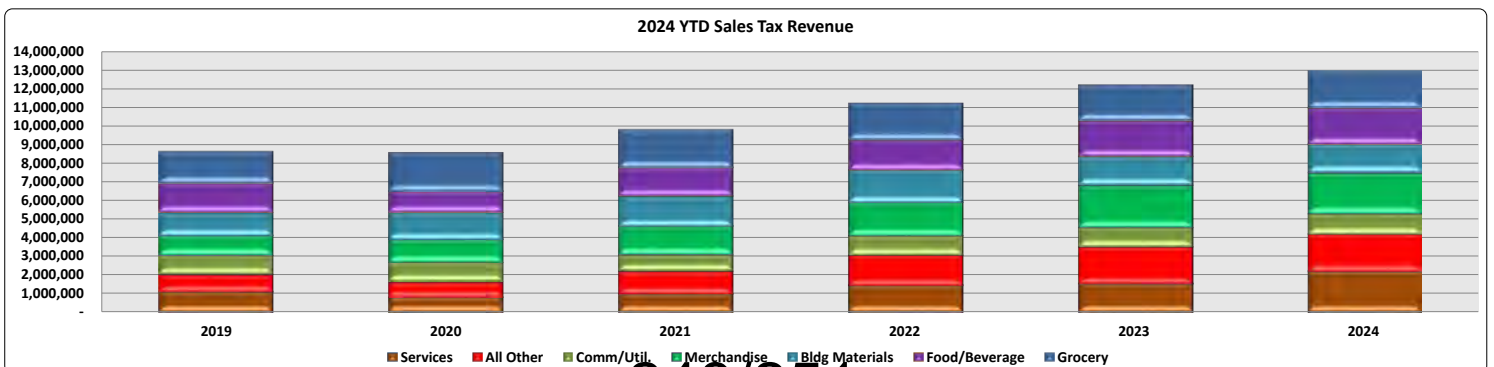
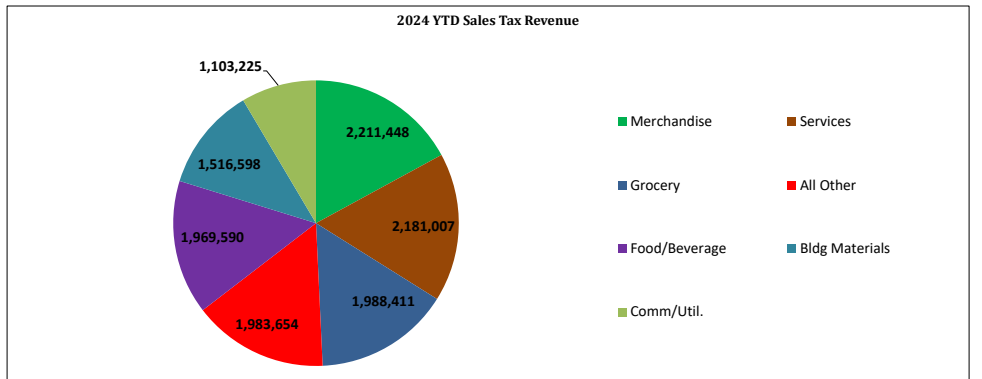
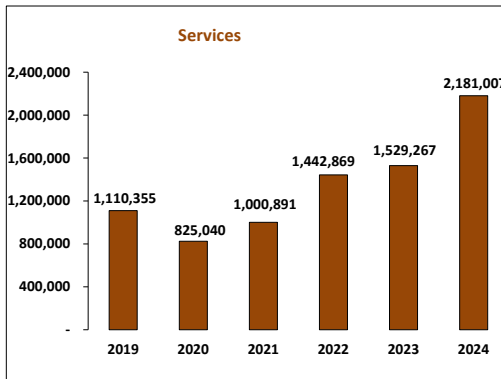
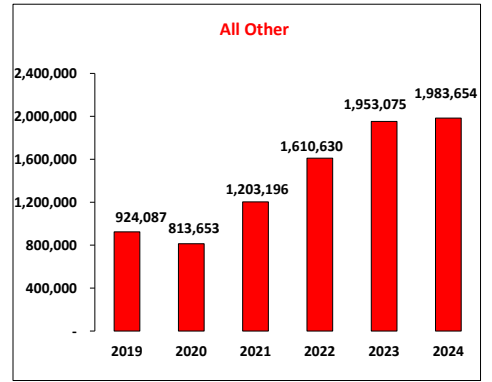
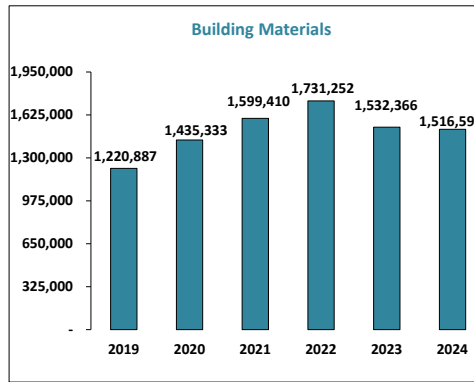
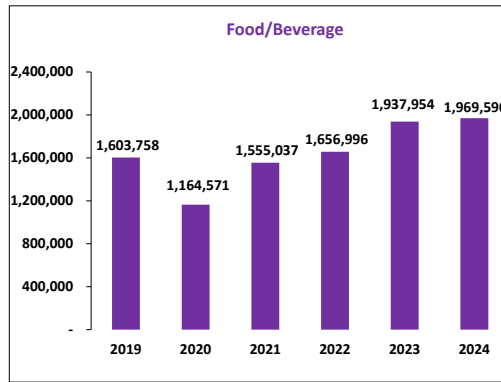
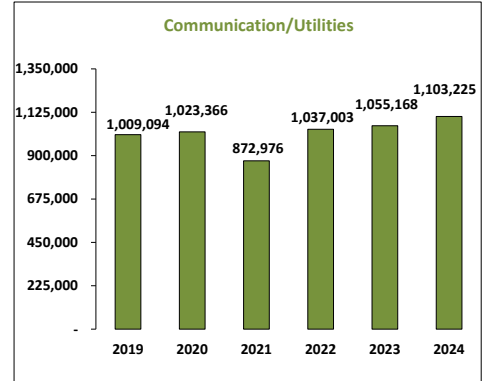
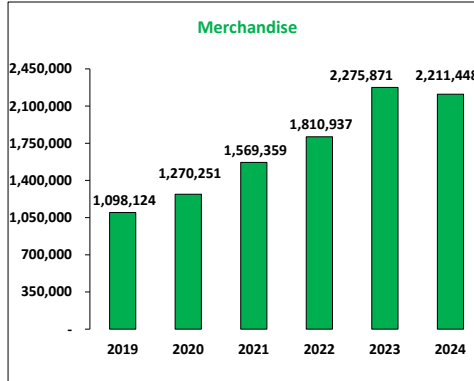
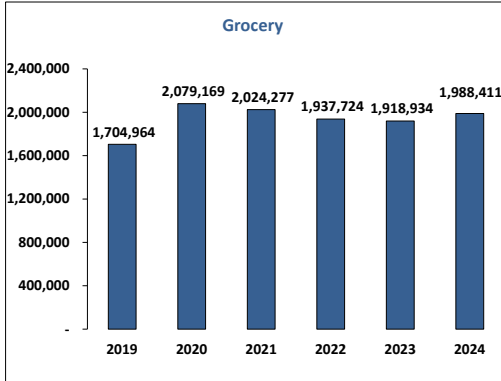
Sales Tax Revenue Comparisons by Industry - Outside City Area (Jan-July 2024)

INDUSTRY NAME	2018 Actual	2019 Actual	2020 Actual	2021 Actual	2022 Actual	2023 Actual	2024 Actual	% Of Total	% Change
General Merchandise	572,497	596,330	942,524	1,159,152	1,320,263	1,757,695	1,643,448	26.2%	-6.5%
Communications/Utilities	876,809	1,006,094	1,023,008	872,735	1,036,758	1,054,794	1,102,998	17.6%	4.6%
Services	149,926	221,871	184,882	304,084	415,172	491,966	835,927	13.3%	69.9%
Manufacturing	83,680	149,291	115,730	172,915	380,022	589,973	553,983	8.8%	-6.1%
Finance/Leasing	229,978	231,853	265,690	236,104	453,215	356,526	506,648	8.1%	42.1%
Building Mat'l's/Construction	152,486	217,215	209,458	272,261	385,646	507,937	488,966	7.8%	-3.7%
Wholesale	158,684	126,221	158,385	243,229	272,926	320,792	467,606	7.5%	45.8%
Furniture	112,611	110,232	157,979	190,025	249,260	223,207	225,139	3.6%	0.9%
Food/Beverage	7,530	20,242	28,752	105,500	103,620	118,569	133,287	2.1%	12.4%
Apparel	10,868	15,791	28,881	33,589	41,957	70,523	107,963	1.7%	53.1%
Grocery	21,090	32,577	35,667	67,790	58,641	70,976	91,082	1.5%	28.3%
Automotive	16	487	3	26	20,581	38,685	73,770	1.2%	90.7%
Agriculture	4,614	2,090	5,238	21,122	35,346	52,243	38,028	0.6%	-27.2%
Totals	2,380,789	2,730,295	3,156,197	3,678,530	4,773,407	5,653,883	6,268,845		
% Of Change	17.3%	14.7%	15.6%	16.5%	29.8%	18.4%	10.9%		



CITY OF LOUISVILLE
Revenue History by Industry (Jan - July 2024)

	2019	% Var	2020	% Var	2021	% Var	2022	% Var	2023	% Var	2024	% Var	% of Total
Merchandise	1,098,124	-3.4%	1,270,251	15.7%	1,569,359	23.5%	1,810,937	15.4%	2,275,871	25.7%	2,211,448	-2.8%	17.1%
Services	1,110,355	4.9%	825,040	-25.7%	1,000,891	21.3%	1,442,869	44.2%	1,529,267	6.0%	2,181,007	42.6%	16.8%
Grocery	1,704,964	-7.6%	2,079,169	21.9%	2,024,277	-2.6%	1,937,724	-4.3%	1,918,934	-1.0%	1,988,411	3.6%	15.3%
All Other	924,087	6.0%	813,653	-12.0%	1,203,196	47.9%	1,610,630	33.9%	1,953,075	21.3%	1,983,654	1.6%	15.3%
Food/Beverage	1,603,758	2.3%	1,164,571	-27.4%	1,555,037	33.5%	1,656,996	6.6%	1,937,954	17.0%	1,969,590	1.6%	15.2%
Bldg Materials	1,220,887	6.7%	1,435,333	17.6%	1,599,410	11.4%	1,731,252	8.2%	1,532,366	-11.5%	1,516,598	-1.0%	11.7%
Comm/Util.	1,009,094	14.8%	1,023,366	1.4%	872,976	-14.7%	1,037,003	18.8%	1,055,168	1.8%	1,103,225	4.6%	8.5%
	8,671,270	2.0%	8,611,383	-0.7%	9,825,146	14.1%	11,227,410	14.3%	12,202,636	8.7%	12,953,932	6.2%	





Finance Committee

September 19, 2024
Packet Addendum #1



GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

Please answer the following questions as concisely as possible in the space provided. Applicants should plan to attend the September 19th Finance Committee meeting, held virtually at 4:00 pm in case questions or additional information is required. The City reserves the right to request additional information by e-mail or telephone after the Finance Committee has reviewed the application.

The proposal summary should be reviewed by both an official of the agency's governing board and, if applicable, the agency's director.

The application and all required attachments should be submitted electronically. Please email the application and all attachments to mmansurabadi@louisvilleco.gov. For the email subject line, please use "[Your Organization Name] Non-Profit Grant Application."

Applications are due on or before 5:00 p.m., Monday, August 26, 2024

Required Attachments:

- List of Board of Directors and key officers or active volunteers.
- Copy of agency's 501(c)(3) tax ruling from IRS.
- Copy of your agency's most recent IRS Form 990
- The most recent copy of your budget, financials, and Annual Report

Organization	<u>Impact on Education</u>		
Program Title or "General Operating"	<u>General Operating</u>		
Contact Person	<u>Katie DiMercurio</u>	Title	<u>Program Director</u>
Address	<u>721 Front St, Suite A</u>		
Telephone	<u>303-524-3865</u>	E-Mail	<u>katie@impactoneducation.org</u>
Program Duration (if applicable)	Begin	<u>N/A</u>	End
Anti-Discrimination Policy (Required)	Yes	☒	No ☐ Other
Grant Amount Requested for	2025	2026	
	<u>\$ 5000</u>	<u>\$ 5000</u>	

CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS

1. **Organizational background:** What is the mission of your organization? Briefly present the strategies you use to achieve your mission. What is the source of information used to verify the need for the services your organization provides?

Impact on Education (IOE) has provided programs that benefit Boulder Valley School District (BVSD) students since 1983. Our mission is to support BVSD students with supplemental funding and resources in order to address critical needs and opportunity gaps. IOE targets systemic barriers that impact students based on socioeconomic status, race, gender, class and other marginalized identities. Our programs span a variety of educational initiatives because inequities exist across the student experience. Our vision is an equitable future for public education across Boulder Valley's public schools.

IOE is unapologetically equity-focused in our work and committed to providing comprehensive and impactful support to ensure BVSD students receive excellent education. We exist to provide support and resources to students facing the most barriers to success. We recognize that racial equity can be a barrier to excellent education and prioritize investments toward students from historically marginalized communities. This work is critically important in a community like Boulder County where there is a high correlation between the opportunity gap, students of color, and students from low-income families. We verify our work through metrics and evaluation in all of our programs and investments.

2. **Program description:** What are the specific activities/programs for which you are requesting funding? If requesting general/operating support, provide an overview of the organization's activities.

Career and College Pathways: IOE conducts a Career Readiness Academy, empowering at least 70 historically marginalized BVSD high school students through a series of after school workshops. We also support access to career and college pathways for under-resourced students by providing scholarships.

Academic Opportunity Fund: IOE provides \$180,000 in educator resources each year to ensure all classrooms have the resources to meet student and educator needs. These grants help to bridge opportunity gaps and level the playing field at all schools.

Learning Tools: Our Crayons to Calculators program distributes backpacks and supplies to 5,000 low-income students at the beginning of each school year. IOE also provides multicultural art supplies to every elementary school and middle school.

Early Childhood Education: IOE partners with BVSD to offer a comprehensive, full-day summer school program for rising kindergarteners each year. The program focuses on students who didn't attend preschool and students from historically marginalized communities and delivers a preview of the first month of kindergarten.

Mental Health: IOE provides mental health support during the school day by providing students access to mental health professionals who work across BVSD schools, offering educational events for parents and caregivers, and fully funding the creation and staffing of drop-in Wellness Centers in high schools.

3. **Program measurements:** Provide the following information for the program/activities for which funding is requested:

Quantitative measures: For example, describe the overall population and geographic area targeted for service, with more specific information about the population you expect to reach in Louisville.

IOE is the non-profit arm of BVSD, we serve all BVSD schools, including rising Kindergartners-12th graders and teachers and administrators across the district. Vital funding from the City of Louisville will help IOE deliver high-quality programming across Louisville's schools. Specifically we exist to support low-income and historically marginalized students in BVSD. There are around 7000 students who are signed up for free or reduced lunch in BVSD every year. Additionally, BVSD is made up of around 35% students of color. There are 3,836 BVSD students attending school in Louisville. Last school year, IOE directly delivered the following resources to Louisville schools and students:

- Support of a full-time mental health professional staffing the drop-in Wellness Center at Monarch High School. Over 25% of the school population utilized this resource and students left the center feeling better than they came in.

- \$12,820 in Academic Opportunity Fund money went to Louisville schools, this figure represents 8% of total AOF money distributed

- 7.4% of school supply distribution, Crayons to Calculators, went to supporting low-income students in Louisville schools

- Continued after school childcare coverage and transportation for Marshall fire affected families.

Qualitative measures: How will you measure the success of this program/activity?

IOE defines success through the impact of investments in our community. We use qualitative and quantitative data to drive investment decisions and our programs are evaluated regularly to ensure we're meeting the needs of our community. We rely on independent expert assessors to provide accurate and thorough program evaluations.

We recognize the importance of centering voices of all stakeholders and employ different strategies to ensure diverse perspectives inform every aspect of our program development, execution, and evaluation. IOE prioritizes inclusivity by actively seeking input from educators, students, district partners, parents, caregivers, and the broader community. We are intentional and committed to getting regular feedback from all of our stakeholders through parent, student, and educator surveys, program evaluation interviews, a student advisory board, a program advisory board, and relationships with other community organizations. Each avenue serves a different purpose for every investment that IOE makes.

4. **Evaluation:** If you offered this program in the past year, provide a brief description of successes and challenges. What, if any, changes will you implement to address this evaluation?

Each year our work shifts a little to meet the changing and evolving needs of our schools and students - this agility is one of our greatest strengths - but we consistently provide access to opportunities for students to learn and grow. Our 2023 Impact Report shares more details, but as an example, last year, we provided:

- 13,561 visits from 1875 students to six high school Wellness Centers offering mental health support during the school day
- Over\$154,000 in grants to 117 educators to bridge opportunity gaps and create a level playing field for their students
- After-school Career Readiness Academy workshops for 70 high school students to explore their interests and learning opportunities
- Four weeks of summer learning for 274 incoming BVSD students participating in Kinder Bridge
- School supplies and backpacks for 5,000 students facing financial hardship through Crayons to Calculators
- Community-wide recognition for 58 educators dedicated to public education
- Multicultural art supplies for 17,000 elementary and middle school students

We collaborate with BVSD on a regular basis to determine what the future needs of our students are. In addition, we complete an in-depth evaluation on all of our programs at least once a year.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

5. **Leadership:**

- How many people serve on your Board of Directors and how many of these are Louisville residents?

16 people serve on our Board of Directors, 2 of them are Louisville Residents

- How many staff does your organization employ and what is the total full-time equivalent? Are any of your staff members Louisville residents?

We employ 8 staff, 6 full-time staff and 2 part-time. We have 2 staff members who are Louisville residents.

- Does your organization utilize volunteers? If yes, provide a brief description of their role and the approximate number of volunteer hours donated in a year.

IOE relies heavily on generous donations of time and talent from our community members. We currently have over 170 volunteers who support our work and provide service to BVSD schools who request assistance. We estimate that our organization benefits from over 1000 hours of volunteer service each year.

- Who will be responsible for the administration of the program or service?

Our program director, Katie DiMercurio is responsible for the administration of all the programs that IOE runs. Our executive director, Allison Billings is responsible for oversight of funds.

6. Please identify any other agencies/organizations that are currently providing similar services to the targeted population. Describe any cooperative or collaborative efforts between your organization and the other agencies.

IOE is the only organization – other than BVSD – that serves the entire BVSD student body of 28,000 students and 4,000 educators. We partner with a wide range of organizations and institutions to ensure that we deliver the most current and most engaging programming. Partnerships are integral to much of our work, allowing Impact on Education to most effectively use its limited resources and keep its overhead low while ensuring long-term sustainability.

7. Please include any additional information that would be helpful to the Finance Committee in evaluating your agency's need for funding.

We appreciate the support from our City governments in ensuring that students receive an equitable and excellent public education. As the foundation for BVSD, we were founded to support underfunded schools. While schools are still underfunded, we have evolved to provide support for targeted programs that remove economic and learning barriers, increase equity among our students and close opportunity gaps. IOE invests 87% of our funds targeting systemic barriers that impact students based on socioeconomic status, race, gender, class, and other marginalized identities. We ensure that the 7,000 BVSD students from low-income households have access to equitable learning opportunities. Our programs span a variety of educational initiatives because inequities exist across the student experience.

**CITY OF LOUISVILLE, COLORADO
GRANT APPLICATION FOR NON-PROFIT ORGANIZATIONS**

Please list all funding sources anticipated for your 2025-2026 fiscal years for the entire program/agency.

Source of Funding	Estimated/Requested Funding Amount	Percent of Total
Individuals	\$526,874	19.4%
Businesses	\$195,119	7.2%
Foundations	\$891,184	32.8%
Government	\$134,992	5%
Endowment	\$600,000	22.2%
Events	\$364,109	13.4%

I swear or affirm that the above information is true and correct to the best of my knowledge and belief.

Signature


Allison (Impacted) (Sep 9, 2024 16:15 MDT)

Agency Director

303-524-3865

Telephone Number

allison@impactoneducation.org

E-Mail Address

Signature


Cathleen Kendall (Sep 9, 2024 16:39 MDT)

Board President

303-517-7067

Telephone Number

cathleenkendall@gmail.com

E-Mail Address

Applications may be considered public record after presentation to the Finance Committee pursuant to City Ordinance and the Colorado Open Records Act. The City will notify the applicant of any request for disclosure and it will be the responsibility of the applicant to object and to pursue any legal actions pursuant to Colorado law. An applicant shall notify the City within 24 hours of notification by the City of request for disclosure of the applicant's objections to disclosure and the applicant's intent to pursue lawful protection under Colorado law. Any proprietary or otherwise sensitive information contained in the application is subject to potential disclosure. Submitting it waives any recourse with respect to disclosure and indemnifies the City for any charges directly related to the City's disclosure.