

City and Borough of Sitka
ANNUAL GRANTS FROM GENERAL FUND

SUMMARY SHEET

Name of Organization: Brave Heart Volunteers (BHV)

Alaska State Business License Number (if applicable): 1041203

Name of Contact Person: Angie DelMoral, Executive Director

Phone: [REDACTED] Email: [REDACTED]

Mailing address: [REDACTED]

Grant Category (check either annual or special emergency grant, and check type of services for annual grant):

- Annual Grant:
 - Human Services or
 - Cultural and Educational Services
 - Community Development
- Special Emergency Grant

Dollars Requested: \$10,000

Match Dollars Committed: \$10,000 Percentage: 100%

Sources of Matched Dollars: Individual/business donations, Pick.Click.Give, fundraising, and a grant from the Sitka Alaska Permanent Charitable Trust.

Brief Description of the Purpose of the Grant: Brave Heart Volunteers requests funding to support the management and oversight of volunteer visiting, grief support, caregiver respite, and compassionate support at end-of-life for care receivers; the development and implementation of quality training for all volunteers; and the provision of sound educational resources for volunteers and community members. All BHV services are free of charge and not duplicated by another organization in Sitka.

I, Michele Friedman, do hereby certify that all information provided for this grant application is accurate and complete to the best of my knowledge.

Name: Michele Friedman

Title: BHV Board President Date: 8/1/24

Detailed Project Description Overview

What grant category are you applying for?

Brave Heart Volunteers (BHV) is applying for an annual Human Services grant.

What will be done with these funds?

BHV requests \$10,000 to help support the growth and sustainability of our organization as we provide core community-based services in four main areas: 1) Volunteer Visiting; 2) Caregiver Respite & Support; 3) Grief Support & Education; and 4) End-of-Life Compassionate Support.

What will be done with funds?	Who will do it?	Who will be served?	When will this service be provided?
Companionship Volunteer Training	BHV staff, Board members, volunteers, and local professionals	Interested Sitkans to be trained to offer confidential, compassionate companionship to those in need	Ongoing, with an annual training in Fall
Volunteer Support and Education	BHV staff	Active volunteers	Monthly volunteer check in & education
Volunteer Visiting and Caregiver Respite	BHV staff and volunteers	Sitkans who are caregivers and their care receivers	Ongoing, as needed
Caregiver Support & Education	BHV staff, Board members, and local professionals	Sitkans who are caregivers for elders with dementia, illness, or end-of-life challenges	Ongoing, as needed
Adult Grief Support & Education	BHV staff, Friend in Grief (FIG) Volunteers, and local professionals	Adult Sitkans who are experiencing grief and loss	Ongoing, as needed
Compassionate Care at End of Life Training	BHV staff, Board members, volunteers, and local professionals	New volunteers and interested Sitkans who want to support those at end of life	Ongoing, with an annual training in Fall
Volunteer Support for those at End of Life	BHV staff and volunteers	Sitkans at the end of life, their families, and other caregivers	Ongoing, as needed
Communitywide Education	Staff, Board members, experts, and others	Sitkans seeking education about grief, loneliness, or end of life.	Once or twice yearly

Has the agency received CBS General Fund Grants previously? If so, how many, which years, and for what amount?

BHV submitted its first grant application in 2005 and received an award of \$8,000. BHV has received funding for the past 18 years with award amounts ranging from \$7,583 to \$30,000. In 2023, BHV was awarded \$8,381.

Expected Outcomes

How will the project be measured as successful?

Measurements of success include:

- Feedback from participants, care receivers, and their families about program service delivery. Our goal is total satisfaction. All feedback is reviewed by staff, and changes are implemented if necessary.
- Ensuring that our programming is relevant and meeting community needs.
- Attendance at support groups and educational trainings/workshops remains high and participants return for future events.
- Participants and volunteers continue to maintain high levels of engagement and contributions of their time, talent, materials, and expertise.
- Businesses and individuals continue to donate financially to help sustain our mission to serve our neighbors.

What will the tangible community benefit be?

The most important benefit to the community is our consistent provision of free human services to Sitkans in need. At BHV, we continue to see profound levels of loneliness among our elderly and homebound care receivers, and intense grief within Sitkans of all ages. The requests for social, emotional, and instructional support has continued to rise since the pandemic, and BHV works diligently to meet these needs. We also provide caregiver respite, a comforting bedside presence for those at end of life, and quality educational services for our volunteers and the community.

Another key benefit is that BHV connects people from all walks of life to create a diverse network of support for and among Sitkans. We are also a valuable outlet for dozens of citizens who long to volunteer and help others. Our volunteers donate thousands of hours in service each year and they make a meaningful impact in the lives of the people they serve.

What are some benchmarks during the project that indicate things are going in the right direction? Our program effectiveness and success are measured by tracking data in all program areas, then comparing the data and factoring in the feedback. The areas we track include: 1) types of services desired to meet community needs; 2) number and types of trainings; 3) number of people served; 4) number of training and support group participants; 5) number of people using the resource library; 6) number of new volunteers and other participants; 7) number of care receivers; 8) number of new referrals; 9) number of community groups and/or citizens served; and 10) total donations given by community-based individuals and businesses.

Statement of Need

How does this project align with the funding category that you are applying for?

BHV is a human services organization that champions those facing loneliness, grief, and end of life. BHV aims to alleviate their suffering through social, emotional, and instructional support. Also, because Sitka does not have a hospice organization, our BHV-trained volunteers play an essential role in providing bedside comfort to those at the end of life and for their caregivers in need of respite. We value our role as supporters of residents who are facing such difficult experiences and feel honored to serve them.

What documented needs (ie McDowell Reports, the Comprehensive Plan, Youth Risk Behavior Survey, etc.) does this project address?

The primary population BHV serves is elders, and in 2023, BHV served 317 Sitkans—most of whom were senior citizens. According to the *McKinley Research Group 2023 Sitka Economic Plan*, Sitka has seen a 34% increase in seniors in the last decade. Also, the *Sitka Comprehensive Plan for 2030* states that the number of those aged 65+, especially those aged 80+, is expected to “grow rapidly” and will account for a quarter of Sitka’s population in 2030. Supportive care and social engagement for elders is critical to allowing them to comfortably and safely age in place. Elders deserve to feel valued and to lead dignified, engaged lives. Our mission exemplifies this message and our care receivers consistently confirm that weekly visits with our volunteers give them a sense of belonging, purpose, and joy.

Additionally, as our elderly population increases, we can expect a greater need for end of life comfort support, which BHV remains committed to providing.

Does the funding from this request leverage other funds for the project? How?

The demonstration of local government support is essential to our sustainability as an organization and our ability to apply for other grants. Consistent funding from CBS also shows an ongoing commitment to helping BHV serve our neighbors in need. It also indicates to residents, businesses, and other donors that our mission and purpose are worthy of financial support.

Organizational Capacity

Track record (this or similar project delivery and management)

For 23 years, BHV has served hundreds of Sitkans. We have also trained and managed hundreds of volunteers, who have donated tens of thousands of service hours to our residents. Also, because our companionship and bedside support services are not available from any other source in the community, BHV fills a unique, highly essential gap.

Additionally, we have refined our mission, strengthened our programs, and perfected our instructional services, which are respected throughout Alaska and beyond. Our solid partnerships with fellow service agencies, civic groups, faith groups, the health community, state organizations, and other nonprofits are another indication of our merit.

Community Support

The community's responsiveness and generosity to BHV remains steadfast. We continue to maintain solid volunteer and donor bases, and see robust community support at our fundraisers. Additionally, after BHV provides individuals with support, they and/or their family members often become volunteers themselves because they have experienced the value of our programs firsthand. In all, our longevity, quality care, and the distinctive services we provide allow us to maintain high levels of support in Sitka.

Board Attendance

Our dedicated Board of Directors has eight members and the current attendance rate is 82%. Travel and work-schedule conflicts are the main reasons members miss monthly meetings.

List of Board Members and Officers

Board Officers:	Michele Friedman, President
	Dr. Drew Thompson, Vice President
	Gloria Pies, Treasurer
	Valerie Waddell, Secretary
Members:	Tonya Venneberg, Larry Garrity, Kim Hunter, and Kirsten Cotter
Staff:	Angie DelMoral, Executive Director
	Kathryn Winslow, Program Manager

Attachments

- Budget Attachments
 - Statement of assets, revenues, and expenditures for previous year.
 - Detailed budget for current year, including funds for this project.
 - Itemized list of grants received or pending for prior and current years.
- Required Documentation Attachments
 - Copy of nonprofit documentation such as IRS 501c3 designation.
 - Current State of Alaska nonprofit organization's business license.
 - CBS Liabilities Form.

BRAVE HEART VOLUNTEERS

Balance Sheet

07/17/24

As of December 31, 2023

Accrual Basis

	<u>Dec 31, 23</u>
ASSETS	
Current Assets	
Checking/Savings	
1001 · Northrim Checking 228	73,849
1002 · Northrim Savings 031	4,758
1003 · Petty Cash	28
1010 · Northrim Certificate of Deposit	25,000
Total Checking/Savings	<u>103,635</u>
Other Current Assets	
1050 · Investments with Restrictions	
1004 · Restricted Vanguard/Schwab	423,209
1005 · Juneau Community Endowment	116,785
Total 1050 · Investments with Restrictions	<u>539,994</u>
1105 · Receivables Year End	300
1201 · Prepaid Insurance	2,865
Total Other Current Assets	<u>543,158</u>
Total Current Assets	<u>646,793</u>
TOTAL ASSETS	<u><u>646,793</u></u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
20000 · Accounts Payable	210
Total Accounts Payable	<u>210</u>
Other Current Liabilities	
2001 · Payroll Tax Liabilities	779
2010 · Payroll liability	2,168
2020 · Paid Time Off Liability	10,857
Total Other Current Liabilities	<u>13,804</u>
Total Current Liabilities	<u>14,014</u>
Total Liabilities	14,014
Equity	
3200 · Restricted Net Assets/Endowment	539,993
32000 · Unrestricted Net Assets	52,929
Net Income	39,856
Total Equity	<u>632,779</u>
TOTAL LIABILITIES & EQUITY	<u><u>646,793</u></u>

BRAVE HEART VOLUNTEERS

Profit & Loss

07/17/24

January through December 2023

Accrual Basis

	<u>Jan - Dec 23</u>
Ordinary Income/Expense	
Income	
4000 · Donations	
4001 · Individuals	47,177
4002 · Businesses	3,237
4003 · Faith Groups	350
4004 · Pick. Click. Give.	3,162
4005 · Donations Other	1,779
4000 · Donations - Other	250
Total 4000 · Donations	<u>55,955</u>
4010 · Fundraising	
4011 · Alaska Airline Raffle	8,557
4013 · Bowls	17,402
4015 · Fundraisers Other	777
4016 · Buoys & Art	16,326
4017 · Alaskan Getaways	8,400
4018 · Fill The Heart	4,195
Total 4010 · Fundraising	<u>55,657</u>
4020 · Grants	
4021 · Foundation Grants	16,817
4022 · Government Grants	8,381
4025 · Other Grants	1,539
Total 4020 · Grants	<u>26,737</u>
Total Income	<u>138,349</u>
Cost of Goods Sold	
4100 · Credit Card Merchant Discount	2,064
Total COGS	<u>2,064</u>
Gross Profit	<u>136,285</u>
Expense	
5100 · Payroll Expenses	
5101 · Salaries & Wages	104,939
5102 · Payroll Taxes	958
5105 · Workers Comp Insurance	275
5100 · Payroll Expenses - Other	8,212
Total 5100 · Payroll Expenses	<u>114,384</u>
5300 · Professional Fees	
5301 · Contracted Support	335
5304 · Accounting	4,122
Total 5300 · Professional Fees	<u>4,457</u>
5302 · Insurance	8,168
5303 · Telephone, Internet, Fax	3,172
5400 · Supplies	
5401 · Office Supplies	5,958
5402 · Companionship Supplies	1,850
5405 · Fundraiser Expense	3,228
Total 5400 · Supplies	<u>11,035</u>

BRAVE HEART VOLUNTEERS**Profit & Loss**

07/17/24

January through December 2023

Accrual Basis

	<u>Jan - Dec 23</u>
5600 · Promotion	
5503 · Membership and Dues	990
5601 · Postage	446
5603 · Advertising & Promotion	339
	<u>1,775</u>
Total 5600 · Promotion	1,775
Total Expense	<u>142,991</u>
Net Ordinary Income	-6,706
Other Income/Expense	
Other Income	
4008 · Donations In Kind	34,000
4030 · Restricted donations-Endowment	1,850
4038 · Endowment realized gain/loss	481
4040 · Endowment Unrealized Gain/Loss	31,805
4050 · Endowment Dividend Income	13,422
4092 · Interest Income	130
4095 · Endowment Investment Fees	-936
	<u>80,753</u>
Total Other Income	80,753
Other Expense	
5306 · Investment fees in kind	4,000
5311 · Rent in kind	30,000
5700 · Other Expense	0
5901 · Bank Service Charges	191
	<u>34,191</u>
Total Other Expense	34,191
Net Other Income	<u>46,562</u>
Net Income	<u><u>39,856</u></u>

BRAVE HEART VOLUNTEERS
Profit & Loss Budget Overview
 January through December 2024

	Jan - Dec 24
Ordinary Income/Expense	
Income	
4000 · Donations	45,000
4010 · Fundraising	66,000
4020 · Grants	22,500
Total Income	133,500
Cost of Goods Sold	
4100 · Credit Card Merchant Discount	1,500
Total COGS	1,500
Gross Profit	132,000
Expense	
5100 · Payroll Expenses	
5101 · Salaries & Wages	107,901
5102 · Payroll Taxes	1,080
5105 · Workers Comp Insurance	500
5110 · Retirement	5,000
5100 · Payroll Expenses - Other	8,773
Total 5100 · Payroll Expenses	123,254
5300 · Professional Fees	
5301 · Contracted Support	250
5304 · Accounting	4,250
Total 5300 · Professional Fees	4,500
5302 · Insurance	8,500
5303 · Telephone, Internet, Fax	3,000
5400 · Supplies	
5401 · Office Supplies	2,000
5402 · Companionship Supplies	1,750
5405 · Fundraiser Expense	3,500
Total 5400 · Supplies	7,250
5600 · Promotion	
5503 · Membership and Dues	900
5601 · Postage	300
5603 · Advertising & Promotion	250
Total 5600 · Promotion	1,450
Total Expense	147,954
Net Ordinary Income	-15,954
Net Income	-15,954

**Brave Heart Volunteers
Grants Received or Pending**

2024				
Name	Value	Date Closed	Status	
AK Synod ELCA First Fruits	\$500	2/15/24	Awarded	
Sitka Woman's Club	\$150	3/31/24	Awarded	
Sitka AK Permanent Charitable Trust	\$4,065	4/25/24	Awarded	
USCGS&WA	\$769	4/28/24	Awarded	
2023				
Name	Value	Date Closed	Status	
AK Synod First Fruits	\$324	2/15/23	Awarded	
Sitka AK Permanent Charitable Trust	\$5,667	4/25/23	Awarded	
USCGS&WA	\$754	4/28/23	Awarded	
Sitka Rotary Club	\$461	6/30/23	Awarded	
Douglas-Dornan Foundation	\$2,500	6/30/23	Awarded	
CBS General Fund	\$8,381	8/18/23	Awarded	
Rasmuson	\$4,050	8/31/23	Awarded	
AK Airlines vouchers	\$2,500	9/8/23	Awarded	
Foundation for End of Life Care	\$4,600	11/28/23	Awarded	



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: [REDACTED]
Apr. 10, 2012 LTR 4168C E0
[REDACTED] 000000 00
[REDACTED]

BODC: TE

BRAVE HEART VOLUNTEERS INC
% DENNIS LONGSTRETH
[REDACTED]



14405

Employer Identification Number: [REDACTED]
Person to Contact: MR. PATTERSON
Toll Free Telephone Number: 1-877-829-5500

Dear TAXPAYER:

This is in response to your Mar. 30, 2012, 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 OCTOBER 2010.

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.

Alaska Department of Commerce, Community, and Economic Development

Division of Corporations, Business, and Professional Licensing
PO Box 110806, Juneau, AK 99811-0806

This is to certify that

BRAVE HEART VOLUNTEERS, INC.



owned by

BRAVE HEART VOLUNTEERS, INC.

is licensed by the department to conduct business for the period

October 9, 2023 to December 31, 2025
for the following line(s) of business:

62 - Health Care and Social Assistance



This license shall not be taken as permission to do business in the state without having complied with the other requirements of the laws of the State or of the United States.

This license must be posted in a conspicuous place at the business location.
It is not transferable or assignable.

Julie Sande
Commissioner

General Fund Grants for Non-Profit Organizations for Fiscal Year 2025

CBS Liabilities Form

Complete and submit this form with your Non-Profit Grant Application.

Organization Name: Brave Heart Volunteers

- Property Tax

Justin Harris
Justin Harris, Supervisory Senior Accountant
747-1853

- Sales Tax

Justin Harris
Justin Harris, Supervisory Senior Accountant
747-1853

- Municipal Leases

Melody Andalez
Melody Andalez, Procurement Spc
747-1852

- Loan/Promissory Note

Brooke Volschenk
Brooke Volschenk, Controller
747-1801

- Utilities

Chelsey Dumag
Chelsey Dumag, Utility/Harbor Billing Clerk
747-1843

CBS Department signatures must be complete to verify your organization is current on all CBS liabilities.