

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): XXXXXXXXXX

Name of Contact Person: Angie DelMoral, Executive Director

Phone: (907) 747-4600 Email: angie@braveheartvolunteers.org

Mailing address: P.O. Box 6336, Sitka, AK 99835

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 services are free of charge and not duplicated by another organization in Sitka.

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

Name: E.M. JANSEN 

Title: Board President

Date: August 3, 2023

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 17 years with award amounts ranging from \$7,583 to \$30,000. In 2022, BHV was awarded \$7,583.

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 enduring provision of free, compassionate care to Sitkans in need. At BHV, we continue to see the residual effects of the pandemic as it intensified feelings of isolation, loneliness, and grief within our elderly care receivers and Sitkans of all ages. This has led to a marked increase in requests for social, emotional, and instructional support, and BHV is working diligently to meet these needs. We also provide caregiver respite, compassionate bedside support 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 to strengthen Sitka. We also serve as a meaningful outlet for dozens of citizens who desire to help others; they donate thousands of hours in service and continue to make a profound impact in the lives of others.

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 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 experiencing 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 formal 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 who need respite. We value our role as supporters of residents who are facing these difficult experiences and we 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. According to both the *McDowell Group 2019 Sitka Economic Plan* and the *Sitka Comprehensive Plan for 2030*, the number of citizens aged 65+ 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 lead dignified, engaged lives. Our Mission exemplifies this message. In 2022, BHV served 227 Sitkans, the majority of whom were senior citizens. Additionally, as our elderly population increases, we can expect a greater need for end of life services, 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 and our ability to apply for other grants. Consistent funding from CBS also shows an ongoing commitment to joining with BHV to 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 22 years, BHV has served hundreds of Sitkans who faced the challenges of loneliness, grief, caregiving, and transitioning into death. 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. Our solid partnerships with fellow service agencies, civic groups, faith groups, health communities, 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. We have also found that after BHV provides individuals with support, they and/or their family members often become volunteers themselves because they know the value of our programs firsthand. In all, our longevity, quality care, and the distinctive services we provide allows us to maintain high levels of support in Sitka.

Board Attendance

Our dedicated Board of Directors has nine members and the current attendance rate is 77%. Travel and work-schedule conflicts are the main reasons members miss monthly meetings.

List of Board Members and Officers

Board Officers:	Dr. Ellie Jansen, President Michele Friedman, Vice President Gloria Pies, Treasurer Lacey Tuten, Secretary
Members:	Dr. Drew Thompson, Tonya Venneberg, Jerrod Galanin, Larry Garrity, and Mamie Ziegler
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.
 - Include 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

As of December 31, 2022

	<u>Dec 31, 22</u>
ASSETS	
Current Assets	
Checking/Savings	
1001 · Northrim Checking 228	77,382
1002 · Northrim Savings 031	29,753
1003 · Petty Cash	28
1004 · Restricted Schwab Account	393,943
1005 · Juneau Community Endowment	99,336
Total Checking/Savings	<u>600,442</u>
Accounts Receivable	
1101 · Accounts Receivable	2,658
Total Accounts Receivable	<u>2,658</u>
Other Current Assets	
1201 · Prepaid Insurance	2,884
Total Other Current Assets	<u>2,884</u>
Total Current Assets	<u>605,984</u>
TOTAL ASSETS	<u>605,984</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
20000 · Accounts Payable	248
Total Accounts Payable	<u>248</u>
Other Current Liabilities	
2001 · Payroll Tax Liabilities	777
2010 · Payroll liability	2,168
2020 · Paid Time Off Liability	9,869
Total Other Current Liabilities	<u>12,814</u>
Total Current Liabilities	<u>13,061</u>
Total Liabilities	13,061
Equity	
3200 · Restricted Net Assets/Endowment	493,279
32000 · Unrestricted Net Assets	90,187
Net Income	9,457
Total Equity	<u>592,923</u>
TOTAL LIABILITIES & EQUITY	<u>605,984</u>

BRAVE HEART VOLUNTEERS

Profit & Loss

08/02/23

January through December 2022

Accrual Basis

	Jan - Dec 22
Ordinary Income/Expense	
Income	
4000 · Donations	
4001 · Individuals	44,440
4002 · Businesses	12,928
4003 · Faith Groups	350
4004 · Pick. Click. Give.	3,627
4005 · Donations Other	1,462
Total 4000 · Donations	62,807
4010 · Fundraising	
4011 · Alaska Airline Raffle	8,205
4013 · Bowls	14,570
4015 · Fundraisers Other	20,757
Total 4010 · Fundraising	43,533
4020 · Grants	
4021 · Foundation Grants	10,058
4022 · Government Grants	22,583
Total 4020 · Grants	32,641
Total Income	138,981
Cost of Goods Sold	
4100 · Credit Card Merchant Discount	1,844
Total COGS	1,844
Gross Profit	137,137
Expense	
5100 · Payroll Expenses	
5101 · Salaries & Wages	104,328
5102 · Payroll Taxes	918
5100 · Payroll Expenses - Other	8,780
Total 5100 · Payroll Expenses	114,026
5300 · Professional Fees	
5301 · Contracted Support	500
5304 · Accounting	4,151
Total 5300 · Professional Fees	4,651
5302 · Insurance	5,711
5303 · Telephone, Internet, Fax	3,060
5400 · Supplies	
5401 · Office Supplies	882
5402 · Companionship Supplies	1,127
5404 · Education	131
5405 · Fundraiser Expense	2,818
Total 5400 · Supplies	4,957
5600 · Promotion	
5503 · Membership and Dues	340
5601 · Postage	399
5603 · Advertising & Promotion	524
5600 · Promotion - Other	318
Total 5600 · Promotion	1,581
Total Expense	133,986
Net Ordinary Income	3,152

BRAVE HEART VOLUNTEERS
Profit & Loss
January through December 2022

	<u>Jan - Dec 22</u>
Other Income/Expense	
Other Income	
4008 · Donations in Kind	34,000
4030 · Restricted donations-Endowment	12,290
4038 · Endowment realized gain/loss	812
4040 · Endowment Unrealized Gain/Loss	-17,923
4050 · Endowment Dividend Income	11,382
4092 · Interest Income	44
4095 · Endowment Investment Fees	-236
	<hr/>
Total Other Income	40,369
Other Expense	
5306 · Investment fees in kind	4,000
5311 · Rent in kind	30,000
5700 · Other Expense	0
5901 · Bank Service Charges	64
	<hr/>
Total Other Expense	34,064
	<hr/>
Net Other Income	6,305
	<hr/>
Net Income	9,457
	<hr/> <hr/>

BRAVE HEART VOLUNTEERS
Profit & Loss Budget Overview
 January through December 2023

	Jan - Dec 23
Ordinary Income/Expense	
Income	
4000 · Donations	
4005 · Donations Other	45,000.00
Total 4000 · Donations	45,000.00
4010 · Fundraising	
4015 · Fundraisers Other	60,000.00
Total 4010 · Fundraising	60,000.00
4020 · Grants	
4022 · Government Grants	35,000.00
Total 4020 · Grants	35,000.00
Total Income	140,000.00
Cost of Goods Sold	
4100 · Credit Card Merchant Discount	1,500.00
Total COGS	1,500.00
Gross Profit	138,500.00
Expense	
5100 · Payroll Expenses	
5101 · Salaries & Wages	103,305.00
5102 · Payroll Taxes	1,473.00
5110 · Retirement	5,000.00
5100 · Payroll Expenses - Other	8,728.00
Total 5100 · Payroll Expenses	118,506.00
5300 · Professional Fees	
5304 · Accounting	3,700.00
Total 5300 · Professional Fees	3,700.00
5302 · Insurance	9,000.00
5303 · Telephone, Internet, Fax	2,800.00
5400 · Supplies	
5401 · Office Supplies	900.00
5402 · Companionship Supplies	500.00
5404 · Education	250.00
5405 · Fundraiser Expense	2,000.00
Total 5400 · Supplies	3,650.00
5600 · Promotion	
5503 · Membership and Dues	340.00
5601 · Postage	200.00
5600 · Promotion - Other	350.00
Total 5600 · Promotion	890.00
Total Expense	138,546.00
Net Ordinary Income	-46.00
Net Income	-46.00

**Brave Heart Volunteers
Grants Received or Pending**

2023				
Name	Value	Date Closed	Status	
Sitka AK Permanent Charitable Trust	\$5,667	4/25/23	Awarded	
AK Synod First Fruits	\$324	2/15/23	Awarded	
USCGS&WA	\$754	4/28/23	Awarded	
Sitka Rotary Club	\$461	6/30/23	Awarded	
Douglas-Dornan Foundation	\$2,500	6/30/23	Pending	
2022				
Name	Value	Date Closed	Status	
Sitka AK Permanent Charitable Trust	\$6,083	5/20/22	Awarded	
Douglas-Dornan Foundation	\$2,225	6/1/22	Awarded	
CBS General Fund	\$7,583	8/15/22	Awarded	
Sitka Rotary Club	\$350	8/16/22	Awarded	
Sitka Legacy Foundation/ACF	\$1,400	9/23/22	Awarded	
AK Airlines	\$2,500 (vouchers)	9/8/22	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
PO BOX 6336
SITKA AK 99835-6336



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.

PO BOX 6336, SITKA, AK 99835-9560

owned by

BRAVE HEART VOLUNTEERS, INC.

is licensed by the department to conduct business for the period

October 6, 2021 to December 31, 2023
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.

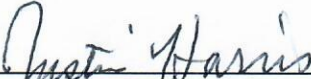
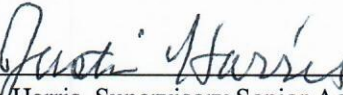
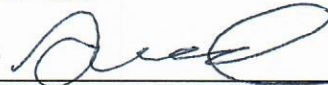
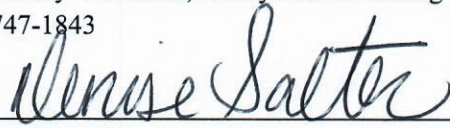

Julie Anderson
Commissioner

General Fund Grants for Non-Profit Organizations for Fiscal Year 2024

CBS Liabilities Form

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

Organization Name: Brave Heart Volunteers

- Property Tax 
Justin Harris, Supervisory Senior Accountant
747-1853
- Sales Tax 
Justin/Harris, Supervisory Senior Accountant
747-1853
- Municipal Leases 
Ashley Workman, Utility/Harbor Billing Clerk
747-1843
- Loan/Promissory Note 
Denise Salter, Controller
747-1836
- Utilities 
Ashley Workman, Utility/Harbor Billing Clerk
747-1843

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