



Brave Heart Volunteers

YEE GU.AA YÁX X'WÁN

Caregiving, Education,
and Respite Services

July 18, 2014

Mark Gorman, City Administrator
City and Borough of Sitka
100 Lincoln St.
Sitka, AK 99835

Board of Directors

Dennis Longstreth
President
747-8375

Ron Fribush, MD
Vice-President
738-1489

Ruth Culp
Secretary
747-8288

Sherie Mayo
Treasurer
747-5776

Aleeta Bauder
747-3145

Kevin Settles, PH.D

Pamela Ash
738-4853

Margaret Andrews
Honorary Member

Fr. David Elsensohn
Honorary Member

Jean Frank
Honorary Member

Brita Speck
Legal Advisor

Curt Ledford
Financial Advisor

Funding Request: \$20,000

Dear Mr. Gorman, and Assembly Members of the City and Borough of Sitka,

Thanks to your support in 2013, Brave Heart Volunteers:

- **Provided free, professional services to 644 individuals**, to meet rising demand;
- **Hired a Clinician and expanded therapeutic programming provided by our Clinician**, especially for those facing Alzheimer's Disease and Related Dementia and Grief and Bereavement;
- **Hired a Youth Grief Program Director** to meet the need of our community's bereaved youth;
- Reached all our 2013 goals within the BHV Sustainability and Business Plan including: launching our first sliding-fee-scale program (suggested donation) which resulted in an income stream of over \$15,000.00;
- Established a planned giving program **resulting in pledges** (legally included in the will of people we have served) **for over \$500,000.00 to our Endowment Fund**;
- Reached our 2013 Endowment fundraising goals of raising over \$100,000.00 and investing that \$100,000.00 in a well-balanced portfolio within a TD Ameritrade account;
- Formed an **Endowment Committee** comprised of the leadership of our business and investment community to assist in the investment and management of the funds. **BHV had a return of 23% in our first year.**
- **Developed and completed** out-of-the-box fundraising projects, unique business investments, and a **fundraising enterprise resulting in proceeds of \$50,000** as well as win-win partnerships.
- Increased grants development; thanks to CBS support, overall **matching grants leveraged by BHV (contingent on CBS matching grants) increased by 43% in 2013.**

Your support allowed us to fulfill our mission of providing free services for people facing chronic illness, terminal illness, end-of-life, and grief and bereavement.

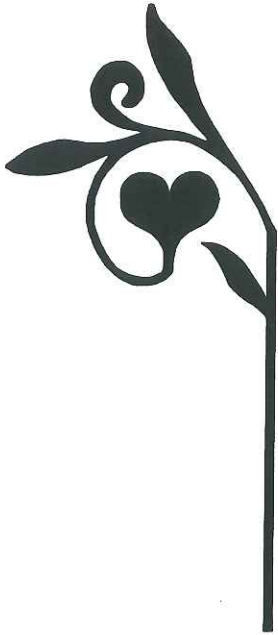
We set the bar high for 2013 and thanks to you and the generosity of our community, we reached our programmatic and sustainability goals. With your support we will carry this momentum into 2014-2015, keeping the bar set high with detailed and measurable goals in both programming and sustainability. The BHV leadership team looks forward to the day when we no longer apply each year to the City and Borough of Sitka for support because our free services are perpetuated through our Endowment Fund.

Thank you again for the opportunity to apply for funding. We are so grateful for your support.

Regards,

Willow Moore
Executive Director

Brave Heart Volunteers
August 1st, 2014



Application for

General Fund Grant for Nonprofit Organizations

City and Borough of Sitka
Fiscal Year 2015



WILLOW MOORE, EXECUTIVE DIRECTOR
BRAVE HEART VOLUNTEERS
P.O. BOX 6336
SITKA, AK 99835
(907) 747-4600
WWW.BRAVEHEARTVOLUNTEERS.ORG
WILLOW@BRAVEHEARTVOLUNTEERS.ORG

Contents

I. SUMMARY SHEET.....	4
II. DETAILED PROJECT DESCRIPTION OVERVIEW	5
III. EXPECTED OUTCOMES	6
IV. STATEMENT OF NEED	7
V. ORGANIZATIONAL CAPACITY.....	8
VI. BUDGET	9
VII. REQUIRED DOCUMENTS	10

I. Summary Sheet

City and Borough of Sitka

ANNUAL GRANTS FROM GENERAL FUND

SUMMARY SHEET

Name of Organization: Brave Heart Volunteers

Name of Contact Person: Willow Moore

Phone: (907) 747-4600 Email: willow@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: \$20,000

Match Dollars Committed: \$20,000 Percentage: 100%

Sources of Matched Dollars: Individual/Business Donations, Fundraisers, Grants (United Way, Alaska Mental Health Trust Authority, etc.) The White Elephant, Civic Groups

Brief Description of the Purpose of the Grant: To fund the day to day operations of providing in-home care and respite services, grief support and education, end-of-life case management and care trainings to individuals and families in Sitka. All services are free of charge or sliding-scale fee (suggested donation), provided year-round and are not offered by any other organization in Sitka.

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

Name: 

Title: Executive Director Date: July 31st, 2014

II. Detailed Project Description Overview

"My family really appreciated all that Brave Heart Volunteers did when my father was sick. We will never forget that. It is nice to be able to give something back so you can continue to help others when they need it the most. Thank you." Family Member of an EOL Care Receiver, 2014

Category: Annual Grant/Human Services

Brave Heart Volunteers (BHV) exists to fill gaps in community services, providing a safety net for individuals and families facing chronic illness, terminal illness, isolation, end of life, or grief/bereavement. BHV volunteers and staff stand alongside patients, families and caregivers during difficult times and served 644 individuals in 2013. Last year, the trained volunteers with BHV (not including staff) provided an average of 13.5 hours of free services a day, the equivalent of \$120,172.00 in uncharged care to Sitka community members. This is instrumental when considering that over 60% of those BHV served found that insurance and other savings were not enough to cover all the costs involved in care at end-of-life, and well over 80% found that there were multiple expenses they had not anticipated.

BHV is seeking \$20,000 to provide a spectrum of services unduplicated in Sitka and to increase sustainability of the organization in order to prepare for the rapidly aging population. BHV values the support of the City and Borough of Sitka. Without funding, many Sitkans would struggle because of the lack of community resources available to help.

What will be done with funds?	Who will do it?	Who will be served?	When will this service be provided?
Therapeutic Arts Group for People with ARD	BHV staff: Family Care Clinician	Sitkans who are living with Alzheimer's or Related Dementia	Last Saturday of every month
Youth Grief Education and Support Group	BHV staff: Youth Program Manager and local professionals	Sitkan youth ages 13 to 18 who are experiencing grief and loss	Weekly, beginning in October
Adult Grief Education and Support Group	BHV staff: Family Care Clinician	Sitkan adults who are experiencing grief and loss	Weekly, reconvening in September
Annual Compassionate Care at End-of-Life Training	BHV Staff and Volunteers, Local Professionals	Current BHV volunteers and interested Sitkans will be trained to serve at end of life	February through April 2015
End-of-Life Services and Case Management	BHV Staff and Volunteers	Sitkans who are in End-of-Life situations, their family and caregivers	On-going, as needed
Care Giver Education and Support Services	BHV Staff and Volunteers, Local Professionals	Sitkans who are caregivers or who are receivers of care from family members	Monthly, all year or as needed
Learning Through Service program	BHV Staff and KGH Elementary School Staff	Senior Center lunch-goers as well as 5th grade students from KGH Elementary School	Mondays, each week during school year
Music Memories program	BHV Staff and Volunteers	25-40 isolated individuals	Tuesday & Thursdays, each week
Volunteer Orientations and Trainings	BHV Staff and Volunteers, Local Professionals	Interested Sitkans will be trained to accompany elders and provide respite for caregivers	Quarterly, ongoing basis as needed

"This is just wonderful. It isn't just about the art; it's about being here with all of you. I can hardly wait for next month." Therapeutic Arts Group Participant, 2014

III. Expected Outcomes

Project benchmarks will be measured regularly to assess program delivery and mission alignment as outlined in the Detailed Project Description Overview and as expressed by the following table of outcomes.

INPUTS	OUTPUTS ACTIVITIES	OUTPUTS PARTICIPANTS	OUTCOMES SHORT TERM	OUTCOMES MEDIUM TERM	OUTCOMES LONG TERM
<p>What we invest</p> <p>Staff. Time. Knowledge. Education Experience. Skills. Coordination. Facilitation. Resources. Materials. Compassion.</p>	<p>What we do</p> <p>Deliver services to persons from all walks of life. Orientations. Support Groups. Trainings. Host professional educational speakers. Offer "best practice" educational resources (e.g., literature, videos, audio, DVDs.) Bring together diverse persons from all walks of life. Strengthen community by creating and maintaining a network of support.</p>	<p>Who we reach</p> <p>Volunteers. Care-receivers (via volunteers). Interested community participants. Family members. Health care professionals. Bereaved youth and adults. Elementary school students.</p>	<p>Learning</p> <p>Participants gain knowledge and understanding of topics, engage setting and environment safe and conducive to learning/sharing, and experience increased self-understanding. Short term learning needs met. Effective speakers. Information and material provided.</p>	<p>Action</p> <p>Participants retain and utilize knowledge of topics. Volunteers and participants express satisfaction with learning experience. Volunteers and participants make referrals to others. Volunteers and participants remain engaged with program over time.</p>	<p>Conditions</p> <p><i>Social</i> - working together to care for each other strengthens and benefits the whole community. <i>Health Care</i> - some system gaps for aging adults and grieving youth are filled. <i>Culture</i> - a compassionate, educated and empowered community in Sitka. <i>Economy</i> - 43,444 volunteer hours donated translates to huge economic impact.</p>
	<p>Measured by</p> <p>Number and types of services, trainings, and persons receiving services. Number and types of persons attending trainings and support groups. Number of persons using resource library. Number and types of persons affiliated with different community, faith and health organizations.</p>	<p>Measured by</p> <p>Number and types of new volunteers and support group participants. Number of care-receivers cared for by volunteers. Number of healthcare professionals.</p>	<p>Measured by</p> <p>Evaluation survey completed at end of each orientation, end-of-life training class session, and support group series. Evaluations reviewed and suggestions for improvements assessed.</p>	<p>Measured by</p> <p>Increased volunteer hours. Participants return to future trainings. Past participants offer positive verbal and/or written feedback. Participants and volunteers support organization with donations of time, volunteering and materials.</p>	<p>Measured by</p> <p>Wider program recognition and positive regard for BHV. Community experiences needs being met (re: program service delivery and related education programming). Outcomes tracked via database and data-driven improvements implemented.</p>
	<p>Example of Success</p> <p>Created two new programs based on documented community needs for youth experiencing grief and elders experiencing dementia.</p>	<p>E.g. of Success</p> <p>2013-2014: BHV increased total amount of professional therapeutic services donated, providing over \$50,000 more professionally facilitated free programming in 2013.</p>	<p>E.g. of Success</p> <p>2013-2014: 100% of C:ARE Luncheon program participants reported that the program met or exceeded their expectations.</p>	<p>E.g. of Success</p> <p>2015 Goal: 10,000 hours of service reported by BHV volunteers, more than doubling our numbers from 2013, which were up by 35% from 2012.</p>	<p>E.g. of Success</p> <p>Database transition is 85% complete, leads to more efficiency, better tracking, and a lower rate of volunteer turnover.</p>

IV. Statement of Need

"Alaska's senior population grew by 79 percent between 2000 and 2012 and is expected to follow the U.S. trend, with the number of Alaskans over 70 growing by just under 60% in the next seven years. More 130,000 baby boomers – those born between 1946 and 1964 – will reach retirement age in Alaska over the next 16 years." Alaska Economic Trends, Alaska Department of Labor and Workforce Development, February 2014.

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

The spectrum of services and programs offered by Brave Heart Volunteers aligns with the criteria outlined in the Annual Grants/Human Services category as is demonstrated by the programs and services themselves, and the BHV mission and vision.

Mission: Transforming lives by providing seamless support and quality educational services for individuals and families facing illness, isolation, end-of-life or grief.

Vision: Weaving together values, tradition, and innovation to enrich each stage of the life cycle, making Sitka an exceptional community where it is possible to find hope through healing after devastating loss.

The success that BHV has had in serving families and caregivers in the community hinges on (1) our unwavering dedication to inter-agency collaboration and eldercare case management, (2) our commitment to offering services free of charge or on a sliding fee scale, and (3) our biopsychosocial approach to supporting caregivers in achieving their goals.

What documented needs does this project address?

Sitka has a large population over age 65 and over age 80, a much higher percentage than the state average and they are projected to increase (population), rapidly. According to the 2010 census, Sitka's population over age 65 was 11.31% of the community, whereas the statewide prevalence of persons over age 65 was at 7.73%. Almost all of BHV Care Receivers are over the age 65, and 26% of them live alone. Department of Labor projections for 2020 show Sitka's +65 group equaling 16.44% of the community, compared to 13% statewide. In 2030, Sitka's +65 residents will constitute 23% of the town, compared to 17% in Alaska as a whole.

Almost half of those BHV cares for live with physical disability or Alzheimer's Disease and Related Dementia (ADRD). The rising rate of referrals BHV received from individuals with ADRD has also followed the state and national trend. In *Moving Forward*, the State of Alaska's Comprehensive Integrated Mental Health Plan: 2006-2011 (the latest version), it is reported that in 2009 (the latest study), an estimated 16,313 caregivers in Alaska provided over 18.5 million hours of unpaid care for family members with ADRD. The number of older Alaskans with Alzheimer's disease is projected to nearly triple by 2030. Given these statistics, the rising referral rate that Brave Heart Volunteers is experiencing is not a surprise. BHV has more referrals than ever, more community partners than ever and serves more individuals than ever. In response, BHV has set the foundation to reach unprecedented organizational sustainability by 2020 and in the meantime, more funding is required to provide our core services to individuals and families who need us today.

"Thank you for all you mean to us at the Pioneers' Home and to the community. Your support was wonderful at the time of my loss." Elderly Resident of the Pioneers' Home, 2014

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

The demonstration of local support is absolutely necessary in order to receive funding from all state and national granters. Funding from the City and Borough of Sitka General Fund Grant is invaluable for leveraging other grants. The funding received from the General Fund Grant in FY13 allowed Brave Heart Volunteers to demonstrate the community support essential in securing grants from larger entities such as the Alaska Mental Health Trust Authority. The loss of City and Borough of Sitka support will significantly impede the ability to secure major grants because BHV will not be able to demonstrate local support. With the growing rate of elders in the Sitka community, lack of funds will result in diminished or removed services and programs vital to their care.

V. Organizational Capacity

"[My volunteer visitor] still comes to help me every week with my correspondence. Being in a wheelchair has separated me from my former activities, friends, and family. Knowing she's coming relieves stress. It is so good to be with someone who is not as hurried as the [nursing home] staff is. It brings me peace to be with her." Care Receiver in the Volunteer Visiting Program, 2014

Track Record: Brave Heart Volunteers has an impeccable track record for grant reports and program delivery. Since our inception, 100% of grant requirements have been met or exceeded.

Community Support: Stress, grief, and loss are universally experienced in caregiving and must be recognized. Brave Heart Volunteers provides caregivers in Sitka with the support they need, often starting services on the same day we receive a call for assistance. In return, BHV has received generous community support. Over 80% of the individuals and families that receive BHV services become donors; many give generously from a very tight budget, yet make regular donations of ten dollars each month. The community support BHV receives grows with every program delivered and each individual and family served. While the levels of community support are the highest ever, the amount of money families are able to donate has followed the national trend of steady decline since the economic downturn. This change coupled with the sharp increase in the number of Sitkans seeking services has BHV at an important crossroads. Providing assistance to families and caregivers in need provides essential benefits to the overall socioeconomic health of our community:

- ♥ In the MetLife Caregiving Cost Study: *Productivity Losses to U.S. Business*, MetLife Mature Market Institute and National Alliance for Caregiving found that the cost to U.S. businesses due to lost productivity of working caregivers is estimated to be between \$17.1 billion and \$33.6 billion per year and growing.
- ♥ The number of individuals in our society requiring personal assistance due to ill health, chronic conditions and disabilities is at an historic level and growing.
- ♥ Personal care aides, individuals who assist the elderly with general care and daily activities, are expected to grow by 40% - the highest growth rate for any single occupation according to Alaska Department of Labor and Workforce Development.

BHV has made great strides to reach a new level of organizational sustainability to meet growing community needs. With City and Borough of Sitka support, BHV will have the ability to continue to offer their spectrum of services and continue to train individuals to care for the elderly.

There are myriad fundraisers for important causes in Sitka. BHV's sustainability plan includes decreasing the number of fundraisers (we cut two small fundraisers in 2013) and increasing the net profits of existing successful fundraisers. We increased our largest fundraiser's net worth by 40% in 2013, while raising the overall quality of the event. Additionally, the 2013 City and Borough of Sitka grant allowed us to leverage new funds from granting organizations, leading to an increase of 43% in total grant awards since September 2013. Greater efficiency in fundraising and increased grant awards enable BHV to improve and expand its free programs and services in response to growing need.

Board Attendance: BHV has eight board members with an attendance rate of 92%. The board meets monthly, all absences are excused. On average, board members miss one meeting per calendar year.

Board

Dennis Longstreth ♥ President
Ron Fribush, MD ♥ Vice President
Ruth Culp ♥ Secretary
Sherie Mayo ♥ Treasurer
Dr. Kevin Settles ♥ At-Large
Aleeta Bauder ♥ At-Large

Margaret Andrews ♥ Honorary
Jean Frank ♥ Honorary, Founder
Fr. Dave Elsensohn, ♥ Honorary

Officers

Brita Speck ♥ Legal Advisor
Nancy Leclair-Davidson ♥ Finance Advisor

VI. Budget

2013 Budget (Actual)Income	
Total Donations	24,354.85
Total Fundraisers	26,252.96
Total Grants	105,217.52
Total Interest Income	27.24
Total Income	\$155,883.18
Expense	
AmeriCorps	6052.86
Total Contracted/Professional	6153.94
Total Insurance	5274.00
Total Fundraiser Expense (event expenses, gifts for Volunteer Appreciation, merchandise investment items)	10,059.50
Jesuit Volunteer Corp. (JVC)	9192.00
Total Operations	190.00
Total Other (bank service charges)	420.17
Total Other Types of Expenses (memberships and dues)	200.00
Total Payroll Expenses	116,494.57
Total Supplies (printing, office supplies, training supplies)	3635.11
Telephone, Internet, Fax	1913.88
Total Travel, Conference & Training	783.80
Total Expense	\$160,369.83*

Grants Received 2013

Alaska Mental Health Trust Authority (AMTHA)
 AMTHA Technical Assistance
 AMTHA Alzheimer's Program
 Sitka AK Permanent Charitable Trust
 CHARR
 City and Borough of Sitka
 Crosset Foundation
 First Bank
 Holiday America
 United Way Community Impact
 White Elephant

Grants Received 2014

Alaska Mental Health Trust Authority (AMTHA)
 AMTHA Technical Assistance
 Sitka Women's Club
 USCG Spouses' and Women's Association
 Sitka AK Permanent Charitable Trust
 SEARHC

2014 Budget (projected)

Income	
Donations	44,848.63
Fundraisers	41,150.00
Grants	95,300.00
Interest Income	58.15
Total Income	\$181,356.78
Expense	
Total Contracted/Professional (Pick Click Give registration fees, Foraker membership, post office-box rent, biennial reporting, and charitable registration fees).	5,372.99
Total Insurance	5,274.00
Fundraiser Expense	1,820.00
Jesuit Volunteer Corp. (JVC)/AmeriCorps Volunteer	16,164.79
Memberships and Dues	250.00
Other (operations and bank service charges)	420.00
Payroll Expenses	140,505.00
Supplies (printing, office supplies, training supplies)	7,550.00
Telephone, Internet, Fax	2000.00
Travel, Conference & Training	2000
Total Expense	\$181,356.78

Grants Pending July 2104 – June 2015

Alaska Community Foundation
 City and Borough of Sitka
 First Bank
 Holland America
 White Elephant
 Crosset Foundation
 Douglas-Dornin
 Healthy Communities
 United Way Community Impact
 CTG Healthcare
 New York Life Foundation

VII. Required Documents

Included in this request are the following documents:

- ♥ IRS 501 c3 designation
- ♥ Current State of Alaska Nonprofit organization business license

Alaska Entity # 74613D

State of Alaska
Department of Commerce, Community, and Economic
Development

CERTIFICATE
OF
GOOD STANDING

THE UNDERSIGNED, as Commissioner of Commerce, Community, and Economic Development of the State of Alaska, and custodian of corporation records for said state, hereby certifies that

BRAVE HEART VOLUNTEERS, INC.

on the 5th day of November, 2001 filed in this office its Articles of Incorporation, as a Nonprofit Corporation organized under the laws of this state.

I FURTHER CERTIFY that said Nonprofit Corporation is in good standing, having fully complied with all the requirements of this office.

No information is available in this office on the financial condition, business activity or practices of this corporation.



IN TESTIMONY WHEREOF, I execute this certificate and affix the Great Seal of the State of Alaska on the 11th day of March, 2009.

A handwritten signature in cursive script that reads "Emil Notti".

Emil Notti
Commissioner

Certification Number: 320821-1

Verify this certificate online at <https://myalaska.state.ak.us/business/soskb/verify.asp>



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248462390
Apr. 10, 2012 LTR 4168C E0
73-1639840 000000 00

00015906
BODC: TE

BRAVE HEART VOLUNTEERS INC
% DENNIS LONGSTRETH
PO BOX 6336
SITKA AK 99835-6336



114405

Employer Identification Number: 73-1639840
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.