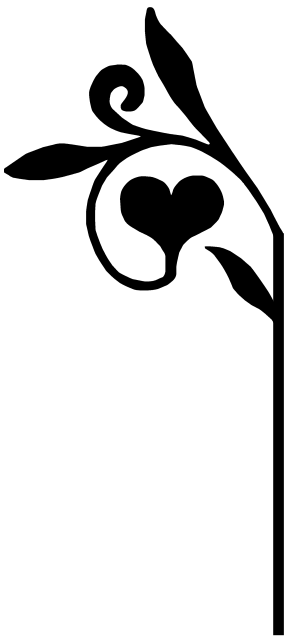


Brave Heart Volunteers
August 26th 2016



Application for

General Fund Grant for Nonprofit Organizations

City and Borough of Sitka
Fiscal Year 2017



ZACHARY DESMOND, PROGRAM DIRECTOR
BRAVE HEART VOLUNTEERS
P.O. BOX 6336
SITKA, AK 99835
(907) 747-4600
WWW.BRAVEHEARTVOLUNTEERS.ORG
ZACHARY@BRAVEHEARTVOLUNTEERS.ORG

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Summary Sheet

City and Borough of Sitka

ANNUAL GRANTS FROM GENERAL FUND

SUMMARY SHEET

Name of Organization: **Brave Heart Volunteers**

Name of Contact Person: **Zachary Desmond**

Phone: **(907) 747-4600** Email: **zachary@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: **\$30,106**

Percentage: **150.53%**

Sources of Matched Dollars: **Individual/Business Donations, Fundraisers, Grants (Sitka AK Charitable Trust, Alaska Mental Health Trust Authority, White Elephant), Civic Groups**

Brief Description of the Purpose of the Grant: **Brave Heart Volunteers requests \$20,000 to assist in funding three core programs serving individuals who are seriously ill, isolated, at end of life or grieving, as BHV staff and board execute long-term sustainability strategy involving a significant partnership with Sitka Community Hospital and innovative organizational restructuring.**

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

Name: **Zachary Desmond**

Title: **Program Director**

Date: **August 26th 2016**

Detailed Project Description Overview

Category: Annual Grant/Human Services

Project Overview: Brave Heart Volunteers (BHV) is seeking \$20,000 to deliver core services through three programs providing essential support and education to Sitkans who are seriously ill, isolated, at end of life, or grieving, as the executive team and board of directors strategically establish a working collaboration to sustainably serve this population of Sitkans into perpetuity, in partnership with Sitka Community Hospital (SCH) and others. In the last 12 months, BHV has undergone significant transition, including at the executive level. Responding to internal and external evaluations of program implementation and administrative capacity, BHV leadership has refocused its energy to excellently **deliver core services** [please see "Core Services" table below] while exploring alternative ways to **develop revenue** streams. BHV has tested several fee-for-service models over the last two years. While some have proven successful on a periodic basis (e.g. "pay what you can" grief support programming), most were determined to require a significant departure from BHV's mission (in addition to being potentially duplicative of services otherwise available) and were thus retired.

Given the trend of decreased local, state, and national funding opportunities, however, BHV has recognized the need to significantly adjust its organizational model to become less dependent on grants (which often marginally divert us from our mission) and individual donations, and instead to invest more deeply in inter-organizational partnerships with local healthcare institutions that can utilize BHV's uniquely reputable, trusted, and dependable community-based Palliative Care services. [Please see "Statement of Need" for a definition and description of the Palliative Care model BHV is pursuing with its partners.]

An integrated collaboration based on the Palliative Care model would prove truly innovative, partnering Sitkan institutions who share a vision for a physically, emotionally, and mentally healthy Sitka where citizens can live, age, and die with excellent medical care, sufficient social support, a high quality of life, and dignity. For many of the Sitkans we serve, aging and dying in this way is not possible in Sitka without BHV.

BHV needs the city's investment at this critical time to continue these essential services without interruption as we negotiate a thorough collaboration between BHV, SCH and other healthcare organizations, wherein our hospitals increase their capacity for robust Palliative Care provision and BHV's administrative infrastructure is augmented so that it can collect reimbursement from insurance companies for the reimbursable Palliative Care services it provides. In the near future, we hope to be able to deliver our services to Sitkans without requesting funding from the city and we believe this collaboration is the best strategy to achieve these aims.

Core Services	Who will do it?	Who will be served?	When?
Community-Based Volunteer Services: <ul style="list-style-type: none"> Companionship for isolated elders and chronically ill Sitkans Respite for caregivers End of Life situations 	<ul style="list-style-type: none"> Volunteer companions, visitors, and EOL volunteers, led by BHV's Volunteer Coordinator 	<ul style="list-style-type: none"> Isolated elders living alone, at the Pioneer Home, or chronically ill people in long-term care at Sitka hospitals In-home and family caregivers of elders and chronically ill people Those at end of life, their family and other caregivers 	Ongoing (EOL as needed); New volunteers trained monthly
Education <ul style="list-style-type: none"> End of Life Training Medical Provider Grief/Palliative Care Training Advance Planning (preparing for your death) Workshops 	<ul style="list-style-type: none"> BHV's Therapeutic Care Director, visiting presenters and inter-organizational Palliative Care Team 	<ul style="list-style-type: none"> Volunteers and families who serve as companions to those at end of life Medical providers experiencing duress from work-related grief and/or stress Community member empowerment and guidance around death matters before illness or accident occurs 	EOL training offered annually; others are monthly
Grief and Bereavement <ul style="list-style-type: none"> Grief Peer Support Groups One-on-one Grief Support Community Grief 	<ul style="list-style-type: none"> BHV's Therapeutic Care Director, with support from Program Director. 	<ul style="list-style-type: none"> Sitkans seeking bereavement and grief support in a closed group or one-on-one setting The community-at-large in the event of a community-wide incident resulting in loss of life and grief. 	Support groups ongoing; larger events as needed

Brave Heart Volunteers
Transaction Detail By Account
January 1, 2001 through August 22, 2016

Brave Heart Volunteers

	<u>Type</u>	<u>Date</u>	<u>Num</u>	<u>Name</u>	<u>Memo</u>	<u>Class</u>	<u>Credit</u>	<u>Balance</u>
Grants								
City of Sitka								
	Deposit	07/09/2006		City and Borough of Sitka	Deposit	203 - City of Sitka	8,000.00	8,000.00
	Deposit	07/09/2007		City and Borough of Sitka	Deposit	203 - City of Sitka	15,000.00	23,000.00
	Deposit	07/07/2008	87076	City and Borough of Sitka	Deposit	203 - City of Sitka	10,000.00	33,000.00
	Deposit	08/27/2009	92378	City and Borough of Sitka	Deposit	203 - City of Sitka	20,000.00	53,000.00
	Deposit	08/30/2010	97300	City and Borough of Sitka	Deposit	203 - City of Sitka	30,000.00	83,000.00
	Deposit	09/22/2011	102109	City and Borough of Sitka	Deposit	203 - City of Sitka	13,950.00	96,950.00
	Deposit	09/14/2012	106146	City and Borough of Sitka	Deposit	203 - City of Sitka	20,000.00	116,950.00
	Deposit	09/24/2013	110563	City and Borough of Sitka	Deposit	203 - City of Sitka	20,000.00	136,950.00
	Deposit	09/19/2014	114260	City and Borough of Sitka	Deposit	203 - City of Sitka	14,714.00	151,664.00
	Deposit	10/15/2015	117977	City and Borough of Sitka	Deposit	203 - City of Sitka	9,917.00	161,581.00
Total City of Sitka							<u>161,581.00</u>	<u>161,581.00</u>
Total Grants							<u>161,581.00</u>	<u>161,581.00</u>
TOTAL							<u>161,581.00</u>	<u>161,581.00</u>

Expected Outcomes

Project benchmarks will be measured regularly in each program department, along with our organization-wide sustainability strategy ("Palliative Care Collaboration"), as expressed by the following table of outcomes.

PROGRAM or INITIATIVE	MEASURES OF SUCCESS – BENCHMARKS	MEASURES OF SUCCESS – LONG TERM	TANGIBLE COMMUNITY BENEFITS
Volunteer Companionship Programs	<ul style="list-style-type: none"> • Increase in number of new volunteers trained, total volunteer hours, and volunteers matched with care receivers • Increase in respite hours for unpaid family caregivers • Increase in contact hours for socially isolated elders 	<ul style="list-style-type: none"> • Increase in social engagement for isolated elders and seriously ill patients in long-term care • Decrease in stress for caregivers • Increased access to bereavement support for caregivers 	<ul style="list-style-type: none"> • Community access to a diverse and capable community volunteer corps • Improved quality of life for elders otherwise isolated • Improved health outcomes for caregivers during and after illness of loved one • Decrease in economic duress for families due to cost of care
Educational Programs	<ul style="list-style-type: none"> • Increase in comprehension of caregiver education material through assessments • Number of participants at advance planning workshops • Number of healthcare professionals trained in palliative care and grief support • Increase in number of End of Life Volunteers available 	<ul style="list-style-type: none"> • Increase in caregivers providing informed care to loved ones, and self-care • Increase of Sitkans' willingness and ability to talk about, prepare for death • Improved care from medical providers • Reduction in unwanted solitude for people who are dying with limited social support 	<ul style="list-style-type: none"> • Informed and empowered families are as ready as possible when death and illness occur • Normalize death for Sitkans • Resilient primary caregivers improving quality of life for themselves and family • Decrease in job-related stress for medical providers • Nobody who wants company has to die alone
Grief and Bereavement Support Programs	<ul style="list-style-type: none"> • Increase in number of support group participants and sessions available • Increase in number of former caregivers receiving bereavement counseling • Number of medical providers utilizing grief support • Increase in community-wide communications educating the public about grief and bereavement 	<ul style="list-style-type: none"> • Reduction in complications due to unresolved grief or ambiguous loss for former caregivers • Increase in social cohesion for individuals isolated by bereavement • Reduction in medical provider errors due to job-related stress and grief 	<ul style="list-style-type: none"> • Improved protective factors and community connections for grieving individuals • Fewer caregivers become seriously ill as a result of unresolved grief • Decrease in mental illness caused in part by unresolved grief • Less Stigma in community around grief, bereavement, and loss
Palliative Care Collaboration (coordinating above services with medical partners)	<ul style="list-style-type: none"> • Number of Palliative Care Team meetings • Increase of referrals for long-term care patients in Sitka hospitals into BHV volunteer companionship program • Increase of shared cases for collaborative and specialized care management 	<ul style="list-style-type: none"> • Increase patient and family satisfaction with local healthcare system • Improved communication and interdependence among health institutions • Increase patient-family access to psychosocial, spiritual, and grief support 	<ul style="list-style-type: none"> • Improve quality of life for Sitkans experiencing long-term illness and their families • Decrease in duplication of services and spending of Sitka's limited healthcare resources • Reduce healthcare provider burnout • Improved medical outcomes for people with serious illness

Statement of Need

"While many people over age 65 enjoy good health for some time, eventually most adults will have one or more chronic illnesses often characterized by pain and frailty. The nation's health care system is not well suited to address the array of medical, social, emotional, and other needs of patients living for long periods with serious, but not immediately terminal, conditions." – Robert Woods Johnson Foundation

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

Palliative Care (PC) is a patient-centered approach to healthcare for people with serious illness. It focuses on providing relief from the symptoms, pain, and other duress – physical, psychosocial, or spiritual – of any illness, with the goal to improve quality of life for both the patient and the family. The diagram to the right highlights BHV's contributions to a complete PC model, with a local hospital providing the clinical components.

BHV's three core services – Volunteer Companionship, Education, and Grief and Bereavement Support – provide the non-clinical components of a PC model. By collaborating with local hospitals to contribute our community-based services to the community and to families, BHV can ensure that current and future patients have access to psychosocial support, spiritual health resources, volunteer respite for primary caregivers, and bereavement support to family and caregivers following a death, ultimately improving health outcomes for those who survive the patient.

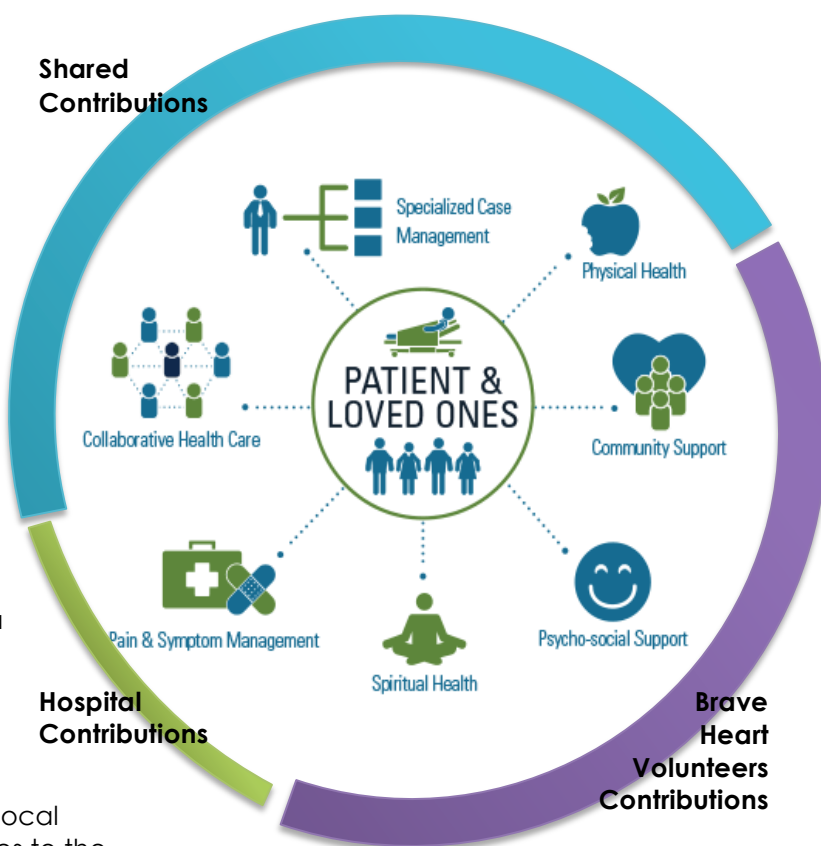
What documented needs does this project address?

Sitka has a large population over age 65 and over age 80, a much higher percentage than the state average and is projected to increase rapidly. An increase in elders experiencing illness, pain, and frailty is certain to increase the number of family (unpaid) caregivers caring for older adults. Acute Stress (or "Chronic Stress") Disorder is endemic to the family caregiver population, causing high risks for elder abuse/neglect, along with high rates of serious illness and chronic conditions following the care of a loved one, often requiring yet another family member to step into the high stress role of unpaid caregiver. This cycle continues uninterrupted unless caregivers are given consistent support, education, and respite from the role. The challenges of caregiving are exacerbated by unresolved grief, which, when left unaddressed, routinely results in poor mental health outcomes for the griever, including depression, anxiety, substance use, and suicidality. Sitka's high ACE scores for adults (BRFSS) also indicate that as the senior population increases, our community will experience a higher-than-usual prevalence of chronic diseases, one of the most significant and long-lasting consequences of adverse childhood experiences. Additionally, Sitkans who took the MAPP survey in 2015 indicated that elder services were one of the top 3 health concerns for Sitka, showing that Sitka is prepared to acknowledge and take action to create a better system of support for elders and those who are chronically ill.

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

City of Sitka's General Fund for Nonprofits Grant is the most effective demonstration of local support and investment in the mission of BHV (a critical requirement of outside granters) and is invaluable for leveraging other grants, especially given the organizational transition that BHV is pursuing. With City of Sitka support, upcoming grant proposals to the Rasmuson Foundation, the Alaska Community Foundation, the Alaska Mental Health Trust Authority and the Robert Woods Johnson Foundation will be dramatically more competitive. Additionally, funds donated in the memory of Ryan Kauffman have been leveraged to create an inter-organizational PC team, the establishment of which is a key strategic objective for the nursing department at Sitka Community Hospital for 2016 and already underway.

The Palliative Care Model



Organizational Capacity

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, whether you're an unpaid family caregiver or a seasoned primary care provider. Brave Heart Volunteers provides caregivers in Sitka with the support they need. In return, BHV has received generous community support. Many beneficiaries of Brave Heart Volunteers services become in-kind or financial donors or elect to become volunteers themselves.

On June 23, 2016, members of the Board of Directors met with the Director of Nursing and staff from SCH Home Health to develop an integrated approach for improving palliative care and geriatric education (including caregiver support and topics on end of life.) SCH is pleased to have a community-based partner with the expertise in education, volunteer companionship programming and emphasis on grief and bereavement services. Our Therapeutic Care Director is receiving certification in Counseling in October and for the first time will be able to bill for grief and bereavement programs and development of care plans with oversight from physicians and nurse practitioners from SCH. Sitka Community Hospital has appreciated our recent six month education series on "Dying Matters: Let's Talk About It." Our focus has been on advanced directives, information about the "dying process" and providing Sitkans advance information on the logistics of death of a loved one. This type of information can help build resiliency for individuals, families and the community at large. Attendance at these gatherings has far exceeded expectations; we are striking a chord in our community about the need to talk about death. Fifty people attended our presentation on advanced directive planning and 25 people attended our gathering at the local funeral home and cemetery tour.

As mentioned above, there has been significant change at BHV in the last 12 months and this has allowed the organization to refocus on core services, increase efficiency of service provision, and cut programs that do not immediately align with our developing strategic direction (e.g. youth grief programming, art therapy for people with ADRD, Caregiver Luncheons, etc.). Lily Herwald served as the interim director at Brave Heart Volunteers from July 2015 to August 2016 and will continue to work with BHV as a liaison with SCH and other healthcare organizations to help develop a collaborative model that integrates BHV program delivery with the administrative infrastructure available through larger healthcare institutions, in hopes of generating sufficient revenue streams to make BHV's volunteer companionship, education, and grief support services affordable and available, in the long-term, to Sitkans who need them most.

This effort to restructure could not be more timely, as the development of a robust palliative care system has never been more important. BHV has made great strides to reach a new level of organizational sustainability to meet growing community needs in the face a rapidly changing financial landscape in our community and state. With City and Borough of Sitka support, BHV will have the ability to continue to offer their essential services to Sitkans while executing an innovative plan to make our operations truly sustainable in partnership with local healthcare organizations, an adaptive and ultimately necessary response to the challenges and opportunities of the day.

Board Attendance: BHV has seven board members with 12-month attendance rate of 93%. The board meets monthly, all absences are excused. On average, board members miss one meeting per calendar year.

Board

Sherie Mayo – President
Aleeta Bauder – Vice-President
Karen Boyer – Treasurer
Dennis Longstreth – Co-Secretary
Dr. Kevin Settles, MD - Vice President
Ruth Culp – At-Large
Michele Friedman – At-Large

Jean Frank – Founder
Margaret Andrews – Honorary
Fr. Dave Elsensohn – Honorary

Officers

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

2015 and 2016 Budget and Anticipated Revenue Streams

2015 Budget (Actual) Income	
Total Donations	105,586.42
Total Fundraisers	15,854.75
Total Grants	202,322.58
Total Interest Income	3,430.88
Total Income	\$327,176.63
Expense	
Total Contracted/Professional	19,321.56
Total Insurance	6,758.87
Total Fundraiser Expense (event expenses, gifts for Volunteer Jesuit Volunteer Corp. (JVC)	2,060.12
	3,160.88
Total Technical Support	2,109.93.00
Total Other (bank service charges)	720.18
Total Other Types of Expenses	5,332.02
Total Payroll Expenses	263,996.57
Total Supplies (printing, office supplies, training supplies)	16,420.56
Telephone, Internet, Fax	4,191.93
Total Travel, Conference & Training	24,298.91
Total Expense	\$348,371.53

Grants Received 2015

Sitka Women's Club
USCG Spouses' and Women's Association
Alaska Mental Health Trust - Beneficiary Program
Sitka AK Permanent Charitable Trust
City and Borough of Sitka
Crossett Foundation
White Elephant
Institute for Healthcare Improvement
New York Life Foundation
Alaska Community Foundation
Alaska Humanities Forum

2016 Budget (projected)

Income	
Donations	82,647.00
Fundraisers	25,400.00
Grants	118,127.00
Interest Income	50.00
Total Income	\$226,224.00
Expense	
Total Contracted/Professional (Pick Click Give registration fees, Foraker membership, post office-box rent, biennial reporting, and charitable registration fees).	8,991.67
Total Insurance	8,313.60
Printing	700.00
Advertising and Promotion	1,750.00
Fundraiser Expense	2,000.00
Health Summit Initiatives	6,500.00
Memberships and Dues	750.00
Other (operations and bank service charges)	320.00
Payroll Expenses	180,718.92
Supplies (postage, office supplies, training supplies)	1,810.00
Telephone, Internet, Fax	4,150.00
Travel, Conference & Training	27,687.00
Accounting	4,500.00
Indirect O/H	4,125.00
Total Expense	\$252,296.19

Grants Received and Anticipated 2016-2017

Alaska Mental Health Trust
Alaska Community Foundation
City and Borough of Sitka
First Bank
Holland America
White Elephant
Sitka AK Permanent Charitable Trust
Douglas-Dornin
Robert Woods Johnson Community Health Prize
Murdock Foundation

Project Budget FY 2017

Budget Category	FY17 budget proposed for CBS General Fund Grant Project
Personnel Amount:	Requested: \$20,000.00 Match: \$29,156.00
Personnel Budget Description:	<p>The combined total for Personnel Services requested is \$20,000. All Personnel Services totals are budgeted for the full 12 months of the project. This is for our Therapeutic Care Director and Volunteer Manager.</p> <p>Therapeutic Care Director Requested: \$12,000 @ \$30 per Hour x 400 hours over the course of the project <i>Match: \$12,000 BHV IN-KIND @ \$30 per Hour x 400 hours</i></p> <ul style="list-style-type: none"> • Providing direct services to grieving individuals and families, participation in palliative care team training. • Remaining time will be dedicated public educational efforts. Evaluation tools will be developed to assess the quality and impact of program services and the progress of beneficiaries, families and caregivers in meeting their care plan goals and objectives in partnership with Sitka Community Hospital. <p>Volunteer Manager Requested: \$8,000 @ \$20 per Hour x 33 Hours per Month <i>Match: \$8,000 - BHV INKIND @ \$20 per Hour x 33 hours per Month</i> The majority of the Volunteer Manager's time is allocated to recruiting and managing volunteers, conducting intakes for requests for care receivers and assisting in education programming.</p> <p>Executive Director Requested: \$0 @ \$38.15 per Hour x 0 Hours per Month <i>Match: \$9,156 BHV INKIND @ \$38.15 per Hour x 20 Hours per Month</i> Time will be allocated to activities such as organizational restructuring conversations and partner development and focus on fundraising through donor development and grant writing, in addition to supporting the activities of the Volunteer Manager and Therapeutic Care Director.</p>
Travel Amount:	Requested: \$0 Match: \$950 BHV IN-KIND
Travel Budget Description:	Our Therapeutic Care Mgr., Erin Matthes, has the required number of "supervised hours" required for her eligibility to take the National Counselors Exam. The benefit to Brave Heart is that her services will be billable thus creating a revenue stream for BHV (therapy group sessions, end of life conversations, etc.) Airfare \$650; Lodging: \$150 x 2 = \$300
Total Project Amt:	<p style="text-align: right;">Requested: \$20,000.00 <i>BHV Match: \$30,106.00</i> Total: \$50,106.00</p>

Required Documents

Included in this request are the following documents:

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

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

DEPARTMENT OF THE TREASURY

Date: MAR 14 2006

Employer Identification Number:

DLN:

SITKA S FAITH IN ACTION INC
PO BOX 6336
SITKA, AK 99835

Contact Person:
THOMAS C KOESTER ID# 31116
Contact Telephone Number:
(877) 829-5500
Public Charity Status:
170(b)(1)(A)(vi)

Dear Applicant:

Our letter dated October 2002, stated you would be exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, and you would be treated as a public charity, rather than as a private foundation, during an advance ruling period.

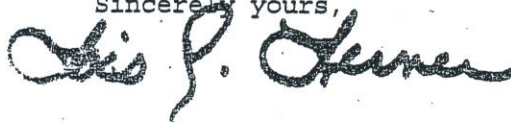
Based on the information you submitted, you are classified as a public charity under the Code section listed in the heading of this letter. Since your exempt status was not under consideration, you continue to be classified as an organization exempt from Federal income tax under section 501(c)(3) of the Code.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, (800) 829-3676. Information is also available on our Internet Web Site at www.irs.gov.

If you have general questions about exempt organizations, please call our toll-free number shown in the heading.

Please keep this letter in your permanent records.

Sincerely yours,



Lois G. Lerner
Director, Exempt Organizations
Rulings and Agreements

Letter 1050 (DO/CG)

Alaska Business License #

1041203

Alaska Department of Commerce, Community, and Economic Development

Division of Corporations, Business and Professional Licensing

P.O. Box 110806, Juneau, Alaska 99811-0806

This is to certify that

BRAVE HEART VOLUNTEERS, INC.

PO BOX 6336 SITKA AK 99835

owned by

BRAVE HEART VOLUNTEERS, INC.

is licensed by the department to conduct business for the period

August 19, 2016 through December 31, 2017

for the following line 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.

Chris Hladick

Brave Heart Volunteers

CBS Liabilities Form

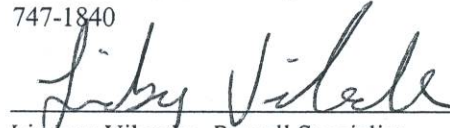
- Property Tax


Hannah Nelson, Tax Accountant
747-1853

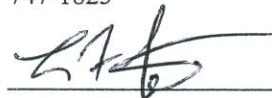
- Sales Tax


Kristy Crews, Accounting/Sales Tax Clerk
747-1840

- Municipal Leases


Lindsey Vilandre, Payroll Specialist
747-1825

- Loan/Promissory Note


Larry Fitzsimmons, Senior Accountant
747-1801

- Utilities


Diana Spiegler, Utility/Harbor Billing Clerk
747-1843

Please have CBS Departments sign off that your organization is current on all CBS liabilities.

This form must be completed and submitted with your Non-Profit Grant Application.