

## Renee Wheat

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**From:** Rick Petersen <rpetersen@sailinc.org>  
**Sent:** Thursday, August 20, 2020 4:07 PM  
**To:** Renee Wheat; Sierra Jimenez; Book Keeping  
**Subject:** SAIL's FY21 application for CBS General Fund Grants for Non-Profit Organizations  
**Attachments:** SAIL City of Sitka Grant narrative FY21.pdf; SAIL 501c3 status.pdf; SAIL 2020-2021 Business License.PDF; SAIL\_CBS Liabilities form\_FY21.jpg

Good afternoon, Renee

Please accept the attached documents as SAIL's application for the CBS General Fund Grants for Non-Profit Organizations.

There are 4 attachments including the application, including documentation of non-profit status, our business licence, and our CBS Liabilities form.

Thank you for your many years of past support and for continued opportunities to apply for support. We appreciate this program.

Best regards,

Rick Petersen, Sitka Program Director  
SAIL - Southeast Alaska Independent Living  
514 C Lake Street  
Sitka, AK 99835  
907-747-6859

City and Borough of Sitka  
ANNUAL GRANTS FROM GENERAL FUND  
SUMMARY SHEET

Name of Organization: Southeast Alaska Independent Living, Inc. (SAIL)

Alaska State Business License Number (if applicable):                     

Name of Contact Person: Rick Petersen

Phone: 747-6859      Email: rpetersen@sailinc.org

Mailing address: 514 Lake Street, Suite C, Sitka, Alaska 99835

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

X Annual Grant:  
X Human Services

Dollars Requested: \$16,000

Match Dollars Committed: \$178,594 Percentage: 91% committed; 9% requested

Sources of Matched Dollars: US Dept. of Ed, AK Dept. of Health and Social Services, Sitka Charitable Trust, White Elephant, Donations, In-kind, Fundraising, Fees for Service

Brief Description of the Purpose of the Grant: SAIL's request to provide essential, often urgent services and support to seniors and/or people with a disability. Additionally for SAIL to engage the community through accessibility assessments and education to increase inclusion of disabilities.

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

Name:



Title: Sitka Program Director

Date: August 18, 2020

## **1. Project Description - Grant Category: Human Services**

Southeast Alaska Independent Living (SAIL)'s mission is simple. It is to *Inspire Personal Independence*. The SAIL Sitka Program empowers seniors and people with disabilities by promoting options to live as active, productive, and involved citizens. SAIL does this by providing services and supports necessary for independent living including home modifications, assistive devices, emergency financial assistance, loans of assistive devices and durable medical equipment, peer support groups, recreation and inclusion activities, and providing educational and outreach programs to the Sitka community.

**SAIL does not duplicate services provided by other agencies in a service area, instead it collaborates with existing agencies and attempts to pick up what is 'falling through the cracks.'** Our collaborative efforts with local organizations such as Alaska Division of Vocational Rehabilitation, Center for Community, Brave Heart Volunteers, Sitka Tribe of Alaska, Baranof Island Housing Authority, Alaska Housing Finance Corporation, SEARHC, Youth Advocates of Sitka, Sitkans Against Family Violence, Sitka School District, Sitka Counseling & Prevention, Sitka Public Library, Southeast Senior Services, Hames PE Center, CBS departments and many other agencies are a key to our success.

**What will be done with the funds and who will do it:** The nature of our work and mission requires SAIL services to be extremely personnel intensive—in Sitka, personnel costs account for 72% of the operating budget. Our services are delivered by a Program Director/Independent Living Advocate, an Independent Living Advocate Jesuit Volunteer, an Employment Specialist and a part-time assistant. We are currently recruiting for a new position: a Developmental Disability Resource Center Coordinator and Aging and Disability Resource Connections Specialist.

This proposal requests \$9,589 for personnel expenses to serve our consumers and to provide disability awareness presentations to the broader community and \$2,991 for operating costs necessary to deliver essential services. Although this request for \$16,000 represents only 9% of our annual budget, support by the City is a vital piece in demonstrating community buy-in, which is critical to leveraging outside dollars to fund our core programs here in Sitka.

**Who will be served:** SAIL Sitka serves seniors and people of all ages and all disabilities including: physical, cognitive, neurological, and mental health disabilities. Thanks to funding received from the City and Borough last year, SAIL Sitka provided Independent Living Services to a total of **156** active consumers. Furthermore, **37** consumers met their goals for independent living and completed use of SAIL's services during the FY20. **168** individuals acquired necessary Assistive Technology and durable medical equipment through our loan closet, with another **12** individuals receiving goods and services through our Last Resort Fund. **25** local high school students have received special services to help them transition into adulthood after a school career with supports from special education teachers. **7** young adults participated in SAIL's first Summer Work Program in partnership with the Division of Vocational Rehabilitation and Youth Advocates of Sitka.

In all, these services dramatically impact the safety, independence, and quality of life of local residents in need. We collaborated with numerous local agencies to ensure success for these individuals as well as share education and awareness to increase understanding of disabilities and foster acceptance of all people.

Disability Awareness and Americans with Disabilities Act (ADA) presentations will continue to be offered to community groups as requested. Last year SAIL provided presentations to **11** local businesses & community groups.

**When will service be provided:** Project services and expenses will be conducted throughout FY21.

**CBS General Fund Grants previously received:**

FY 2005 \$5,000;	FY 2006 \$5,000;	FY 2007 \$4,000;	FY 2008 \$8,850;
FY 2009 \$7,500;	FY 2010 \$5,000;	FY 2011 \$7,500;	FY 2012 \$5,000;
FY 2013 \$10,000;	FY 2014 \$10,000;	FY 2015 \$8,357;	FY 2016 \$4,833;
FY 2017 \$8,835;	FY 2018 \$7,529;	FY 2019 \$6,500;	FY2020 \$7,742

## **2. Expected Outcomes**

**Measurement of Success:** The success and community benefit of this project will be measured by comparing stated objectives and outcomes (table below) against actual results. Obtaining these objectives or “outputs” is quantifiable, tangible and easily measured. Outcomes such as maintaining or increasing independence, improvement in attitudes and quality of life improvements, by nature are more difficult to measure. Therefore, pre- and post-service surveys and comparison of individual goals to post-service results will be used.

**Tangible Community Benefits:**

<b>Objective</b>	<b>Outcome</b>
Empower two hundred (200) Sitka residents by providing Independent Living services for individualized requests (e.g. assistance securing essential life services such as housing, employment, transportation, and benefits such as Social Security, Medicaid, Alaska Public Assistance, etc.)	Sitka residents with disabilities or seniors will increase or maintain independence; increase self-esteem; become active, productive and involved citizens. Bettering the entire community.
Twenty-five (25) Sitka local high school students will receive support to help them prepare for the transition to employment and adulthood.	Young adults who experience disabilities will be able to become more independent as they leave the supportive special education program and move into adulthood.
Ten (10) local businesses or groups will receive disability awareness/ADA training and/or education.	A greater understanding and inclusion of seniors and people with disabilities. Local businesses voluntarily become more accessible after learning the direct benefits of removing both architectural and attitudinal barriers.
Help one hundred (150) individuals acquire necessary Assistive Technology, home modifications, durable medical equipment or funding through the Loan Closet and Last Resort Fund.	Provide more accessibility, safer environments and reduce health disparities in the home, community and workplace. Allow individuals to remain in their home and community.

**Evaluation/Benchmarks-** SAIL maintains complete records for all services and programs both to ensure we meet the needs of our consumers and the community and to provide accurate and timely reports. We use a number of methodologies to evaluate programs and services, ascertain the project is going in the right direction, and adjust services accordingly, as noted below:

- Consumers identify specific individual goals during the original point of program entry; progress and goal attainment monitored
- All individualized and community services are documented in MiCIL, a database designed specifically for Independent Living Centers such as SAIL
- Teachers, students and businesses are surveyed before and after disability awareness training
- Quarterly and annual fiscal & narrative reporting comparing proposed to actual results
- Yearly consumer satisfaction surveys mailed to consumers and results are collated
- Website feedback links. Annual fiscal audits by the firm of Elgee, Rehfeld and Mertz CPAs. Regular site reviews by Alaska Department of Health and Social Services and the US Dept. of Education-Rehabilitation Services Administration

### **3. Statement of Need**

**Funding Category:** This proposal aligns with the **Human Services** Category.

#### **Documented Need:**

According to the State of Alaska Governor's Council on Disabilities and Special Education, "it is generally accepted that 1 in 7 people have some sort of disability according to the definition used in the American with Disabilities Act." Roughly 1,300 Sitka residents experience a disability. We also offer our services, as Sitka's Aging and Disability Resource Center, to everyone over 60. In Sitka there are over 1,800 seniors.

*Healthy People 2020*, a joint project of the US Department of Health and Human Services, Centers for Disease Control and Prevention, and the US Department of Education-National Institute on Disability and Rehabilitation Research, reported, "People with disabilities play an important and valued role in every community. All people, including people with disabilities, must have the opportunity to take part in important daily activities that add to a person's growth, development, fulfillment, and community contribution. The Disability and Health objectives highlight areas for improvement and opportunities for people with disabilities:

- 1- Reduce the proportion of people with disabilities who report barriers to obtaining the assistive devices, service animals, technology services, and accessible technologies that they need.
- 2- Reduce the proportion of people with disabilities who encounter barriers to participating in home, school, work, or community activities.

Without these opportunities, people with disabilities will continue to experience disparities, compared to the general population. The 2020 objectives were developed with extensive input from disability communities, and this partnership between the public health and disability communities must continue over the decade in order to meet the *Healthy People 2020* objectives."

The need for disability awareness education is expressed well by Judy Heumann, former Assistant Secretary at the Office of Special Education and Research Services at the United States Department of Education, when she said: "When I speak out about the oppression of people with disabilities, some professionals will ask, 'Is she bitter about being handicapped?' The answer is yes, I am bitter

about being handicapped, but not about having a disability for **it is not my disability that handicaps me. It is society that handicaps me**, and my brothers and sisters, handicaps us by building inaccessible schools, theaters, buses, houses, and the list goes on. All this helps keep us in our place.”

As individuals age (and we know Sitka is the fastest aging community in the state, per capita) they more often than not have need for adaptive equipment, including durable medical equipment to live more independently and safely in their homes. SAIL’s Loan Closet and HomeMAP assessments are available to assist with needed accommodations so seniors can live safely and independently in their home and community of choice.

This proposal directly addresses the documented need for assistive technology, accessibility modifications, and social participation for seniors and people with disabilities and the need for education and public awareness about the subject of ‘disability.’

**Funding Leverage:** This proposal will most definitely help SAIL Sitka leverage additional program support. Most grant applications SAIL puts forward look for demonstration of community support. Funding provided by the City of Sitka is a proven commitment to our services and to the city’s support of and belief in, the necessity of our programs.

#### **4. Organizational Capacity (track record, community support, Board attendance)**

**Track Record** – SAIL has enjoyed an impeccable record for grant management and service delivery since its inception. The State Independent Living Council conduct an annual consumer satisfaction survey throughout the state and results show an overwhelming enthusiasm for SAIL. The agency and staff have received local, state, and national recognition for excellence. The Alaska Legislature has honored SAIL with a proclamation for providing “people with disabilities the chance to work for self-determination, equal opportunities and self-respect.” SAIL has demonstrated success for the last twenty five years, managing literally dozens of grants every year—every one, without exception, completed successfully.

**Community Support** – One of the agency’s biggest strengths is our ability to collaborate with others by leading and participating in community coalitions. Currently SAIL has active partnerships with numerous agencies in Sitka including the Alaska Division of Vocational Rehabilitation, Center for Community, Sitka Tribe of Alaska, Southeast Alaska Regional Health Consortium, Sitka School District, Southeast Senior Services, Brave Heart Volunteers, Sitka Pioneer Home, Hames PE Center, Youth Advocates of Sitka, Veterans Administration, and others. In addition to agency support, SAIL is supported financially by individual and business donors.

The support of the City and Borough of Sitka is a very important factor in our ability to leverage additional funds. The Last Resort Fund (LRF) is a fund of last resort and has a proven success rate at seeking out other agencies and alternative funding before the LRF kicks in. Most often this leads to a collaborative effort with different agencies, businesses and individuals. Though the successes we witness at SAIL could appear minor to some, for those we serve they are major.

Here's one example of the services that SAIL provides: We have been working with an elder who experiences challenges with mobility and vision. He has experienced an amputation and is legally

blind due to diabetes. This elder is a veteran. In partnership with the Veterans Administration and RuralCAP's Senior Access Program, we are helping him remain at home. With a healthy VA budget, we have helped him to start a business to hire personal care attendants to assist him at home. We have helped him modify his home to adapt to wheelchair use. We have lent him assistive technology to help with vision, and we have found funding for home furnishing. We will be providing training with computer apps so that he may connect to the outside world, even as his vision deteriorates. Once he relearns to walk with a prosthetic and gets comfortable using a computer while legally blind, he plans to work with us on vocational rehabilitation goals so that he may re-enter the workforce. We are also working with him on his goals to make his home more comfortable for his toddler daughter (adopted prior to his vision loss & amputation) so that he may share custody and spend more quality time with her as she grows up.

**Board of Directors** – SAIL is pleased to have an active, engaged Board of Directors with higher than 80% attendance. As a member of the Foraker Group, SAIL has adopted their recommendation of 100% board giving, and a tracking system endorsed by them and the Rasmuson Foundation. One-hundred percent of the Board of Directors make significant annual financial contributions to SAIL.

**SAIL Board Officers:** Board Chair, Norton Gregory – Douglas; Vice Chair, Jeff Irwin – Gustavus; Secretary, Suzanne Williams, Ketchikan; Treasurer Mary Gregg, Ketchikan

**Members:** Bob Purvis, Sitka; Cheryl Putnam, Juneau

SOUTHEAST ALASKA INDEPENDENT LIVING, INC.

Sitka City Grant Proposal - Fiscal Year 2021

**Detailed Sitka Program Budget FY21 and Actual Revenue and Expense FY20**

EXPENDITURES		This	Other	TOTAL	TOTAL
	FT	Request	Funds	Budget	Actual
	E			FY 2021	FY20
<b>A. 100 Personnel Services</b>					
Sitka staff	1.7				
	0	\$7,246	\$85,931	<b>\$93,177</b>	<b>\$77,809</b>
Jesuit Volunteer	1.0				
	0		\$16,000	<b>\$16,000</b>	<b>\$15,000</b>
Fringe Benefits/Payroll taxes		\$2,343	\$24,418	<b>\$26,761</b>	<b>\$22,915</b>
<b>TOTAL Personnel Services</b>		<b>\$9,589</b>	<b>\$126,349</b>	<b>\$135,938</b>	<b>\$115,724</b>
<b>B 200 Travel</b>					
Staff travel		\$0	\$0	<b>\$0</b>	<b>\$0</b>
Auto gas		\$0	\$1,000	<b>\$1,000</b>	<b>\$829</b>
<b>TOTAL Travel</b>		<b>\$0</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$829</b>
<b>C. 300 Facility</b>					
Office rental		\$1,190	\$11,810	<b>\$13,000</b>	<b>\$12,000</b>
Postage		\$12	\$988	<b>\$1,000</b>	<b>\$900</b>
Telephone		\$278	\$2,322	<b>\$3,100</b>	<b>\$3,045</b>

<i>TOTAL Facility</i>	<b>\$1,480</b>	<b>\$15,620</b>	<b>\$17,100</b>	<b>\$15,945</b>
<b>D. 400 Supplies</b>				
Office supplies	\$71	\$2,129	<b>\$2,200</b>	<b>\$1,956</b>
Program supplies	<b>\$1,869</b>	<b>-\$369</b>	<b>\$1,500</b>	<b>\$1,206</b>
<i>TOTAL Supplies</i>	<b>\$1,940</b>	<b>\$1,760</b>	<b>\$3,700</b>	<b>\$3,162</b>
<b>E. 500 Equipment</b>				
Vehicle	\$0	\$850	<b>\$850</b>	<b>\$537</b>
<i>TOTAL Equipment</i>	<b>\$0</b>	<b>\$850</b>	<b>\$850</b>	<b>\$537</b>
<b>F. 600 Other Operating Expense</b>				
Accounting	\$0	\$0	<b>\$0</b>	<b>\$0</b>
Agency liability insurance	\$0	\$0	<b>\$0</b>	<b>\$0</b>
Advertising	\$0	\$0	<b>\$0</b>	<b>\$0</b>
Dues, fees, and licenses	\$0	\$0	<b>\$0</b>	<b>\$0</b>
Consumer Service Fund	\$0	\$0	<b>\$0</b>	<b>\$0</b>
Education & Training	\$0	\$0	<b>\$0</b>	<b>\$0</b>
Scholarships	\$0	\$500	<b>\$500</b>	<b>\$363</b>
Tech Support	\$0	\$0	<b>\$0</b>	<b>\$0</b>
Audit	\$0	\$0	<b>\$0</b>	<b>\$0</b>
Fundraising expense	\$0	\$2,000	<b>\$2,000</b>	<b>\$0</b>
Indirect Cost Rate	<b>\$2,991</b>	<b>\$30,515</b>	<b>\$33,506</b>	<b>\$27,585</b>
<i>TOTAL Other Expense</i>	<b>\$2,991</b>	<b>\$33,015</b>	<b>\$36,006</b>	<b>\$27,948</b>
<b>TOTAL PROJECT COSTS</b>	<b>\$16,000</b>	<b>\$178,594</b>	<b>\$194,594</b>	<b>\$164,145</b>
<b>REVENUE</b>	<b>Project</b>	<b>Other</b>	<b>TOTAL</b>	<b>TOTAL</b>
	<b>Request</b>	<b>Funds</b>	<b>Project</b>	<b>Actual</b>
			<b>Budget</b>	<b>FY20</b>
<i>Local, State, Federal grants</i>				
Sitka City grant	<b>\$16,000</b>		<b>\$16,000</b>	<b>\$6,500</b>
DHSS STAR, ADRC AND IL		\$53,000	<b>\$53,000</b>	<b>\$51,000</b>
HHS-ACL		\$62,194	<b>\$62,194</b>	<b>\$57,466</b>
DHSS OBA grant		\$15,000	<b>\$15,000</b>	<b>\$11,000</b>
<i>Fundraising and Support</i>				
White Elephant		\$3,000	<b>\$3,000</b>	<b>\$3,000</b>
Sitka Charitable Trust		\$6,400	<b>\$6,400</b>	<b>\$3,679</b>
Donations		\$5,000	<b>\$5,000</b>	<b>\$3,500</b>
Fundraising		\$4,000	<b>\$4,000</b>	<b>\$3,000</b>
Fees for service		\$30,000	<b>\$30,000</b>	<b>\$25,000</b>
<b>TOTAL PROJECT REVENUE</b>	<b>\$16,000</b>	<b>\$178,594</b>	<b>\$194,594</b>	<b>\$164,145</b>



Non-profit Documentation Attached Separately as a PDF

CBS Liabilities Form Attached Separately as a PDF

SAIL Business License Attached Separately as a PDF



Department of the Treasury  
Internal Revenue Service

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

In reply refer to: [REDACTED]  
Mar. 28, 2016 LTR 4168C 0

[REDACTED] 000000 00

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BODC: TE

SOUTHEAST ALASKA INDEPENDENT LIVING  
INC  
SAIL  
3225 HOSPITAL DR UNIT 300  
JUNEAU AK 99801-7863



054989

Employer ID Number: [REDACTED]  
Form 990 required: Yes

Dear Taxpayer:

This is in response to your request dated Feb. 29, 2016, regarding your tax-exempt status.

We issued you a determination letter in February 1993, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

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

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

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

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

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

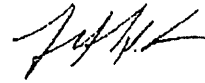
Mar. 28, 2016 LTR 4168C 0

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SOUTHEAST ALASKA INDEPENDENT LIVING  
INC  
SAIL  
3225 HOSPITAL DR UNIT 300  
JUNEAU AK 99801-7863

Sincerely yours,



Jeffrey I. Cooper  
Director, EO Rulings & Agreement

**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

**SAIL**

3225 HOSPITAL DR UNIT 300, JUNEAU, AK 99801-7863

owned by

SOUTHEAST ALASKA INDEPENDENT LIVING, INC.

is licensed by the department to conduct business for the period

October 31, 2019 to December 31, 2021  
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 2021**

**CBS Liabilities Form**

**Organization Name:** SAIL (Southeast Alaska Independent Living)

- Property Tax

Justin Harris  
Justin Harris, Supervisory Senior Accountant  
747-1853, justin.harris@cityofsitka.org

- Sales Tax

Justin Harris  
Justin Harris, Supervisory Senior Accountant  
747-1853, justin.harris@cityofsitka.org

- Municipal Leases

Diana Spiegle  
Diana Spiegle, Utility/Harbor Billing Clerk  
747-1843, diana.spiegle@cityofsitka.org

- Loan/Promissory Note

Larry Fitzsimmons  
Larry Fitzsimmons, Senior Accountant  
747-1801, larry.fitzsimmons@cityofsitka.org

- Utilities

Diana Spiegle  
Diana Spiegle, Utility/Harbor Billing Clerk  
747-1843, diana.spiegle@cityofsitka.org

Please have CBS Departments sign off that your organization is current on all CBS liabilities. Email addresses have been included for your convenience.

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