

## Holley Dennison

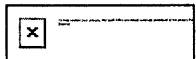
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**From:** Angie DelMoral <angie@braveheartvolunteers.org>  
**Sent:** Tuesday, July 13, 2021 3:21 PM  
**To:** Holley Dennison  
**Subject:** C&B Sitka FY2022 General Fund Grant  
**Attachments:** C&BS FY2022 General Fund Grant Application.pdf

Hi Holley,

Please find attached the Brave Heart Volunteers application for the FY2022 General Fund Grant for nonprofits. If you need more information, please let me know.

Thanks so much,  
Angie



Angie DelMoral, Executive Director  
(907) 747-4600  
PO Box 6336, Sitka, Alaska 99835  
Office location: Manager's House at the Sitka Pioneers Home

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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): [REDACTED]

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: \$9,000

Match Dollars Committed: \$9,000 Percentage: 100%

Sources of Matched Dollars: Individual/Business Donations, Pick.Click.Give., Fundraisers, and Grants. Grants include: Sitka Alaska Permanent Charitable Trust, Alaska Travel Industry Association Foundation.

Brief Description of the Purpose of the Grant: Brave Heart Volunteers requests support to fund the day-to-day management and oversight of volunteer visiting, respite, grief support and education, end-of-life services, training and support for volunteers, end-of-life training for volunteers, health professionals, and community members. All services are provided free-of-charge and are not duplicated or offered by another organization in Sitka.

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

Name: Michele Friedman

Title: BHV Board Chair Date: 7-12-21

### 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 \$9,000 to help support the sustainability of our organization and 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?
Volunteer Orientations	BHV staff, Board members, volunteers, and local professionals	Interested Sitkans are oriented to the organization and policies to provide confidential volunteer visiting with elders	Ongoing; referrals are received throughout the year
Ongoing Volunteer Support and Education	BHV staff and Board members	Active volunteers	Monthly volunteer potlucks, quarterly check in
Volunteer Visiting and Respite Support	BHV staff, Board members and volunteers	Sitkans who are volunteer visitors, or who receive care from family members	Daily, weekly, monthly, all year
Caregiver Support Group and Caregiver Education	BHV staff, Board members and local professionals	Sitkans who are caregivers for elders with dementia, illness, or end-of-life challenges	Monthly support group all year
Adult Grief Education and Grief Support Group	BHV staff, Board members, and local professionals	Adult Sitkans who are experiencing grief and loss	Support groups as-needed; personal Grief Buddies
Annual Compassionate Care at End-of-Life Trainings	BHV staff, Board members, volunteers, and local professionals	Current BHV volunteers and interested Sitkans are trained to serve care receivers at the end of life	6-week sessions offered in spring and fall
End-of-Life Services	BHV staff and volunteers	Sitkans at the end of life, their families, and other caregivers	Ongoing, as needed
Communitywide Education and Trainings	Staff, Board members, experts, and others	Community members	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 \$8,000.00. BHV has received funding for the past 16 years with award amounts ranging from \$8,000.00 to \$30,000.00. In 2020, BHV was awarded \$8,167.

## **Expected Outcomes**

### **How will the project be measured as successful?**

Indications of success for Brave Heart Volunteers include:

- Participants and families provide feedback regarding program service delivery. Our goal is for everyone to express satisfaction in all program areas. All feedback is reviewed by staff and necessary changes are implemented based on the information provided.
- Attendees of support groups and educational trainings/workshops return for future events.
- We continue to see high levels of engagement from participants, families, and volunteers through contributions of time, donations, materials, and creativity.
- Businesses and individuals continue to donate financially to help sustain the organization.

**What will the tangible community benefit be?** 2020 brought many pandemic-related challenges, but the most difficult was our inability to serve clients in the ways we are accustomed. As a heart-based organization, it was distressing to withhold in-person companionship from our elderly and housebound care receivers, and to be unable to sit at the bedsides of those who were dying or provide respite for their caregivers. At a time when people worldwide were experiencing a sense of isolation and grief, we knew these feelings were intensified in our clients, who already suffer a profound sense of loneliness. Throughout, we endeavored to maintain emotional and social connections with our clients and all Sitkans alike, implementing virtual and phone visits, letter writing, and online education to promote positive coping methods. Despite the pandemic, our dedicated volunteers logged nearly 1300 hours of indirect service in 2020. We also gained 16 new volunteers, 11 new care receivers, and served an additional 113 Sitkans through various online programs.

The most important benefit to the community is the continual, free of charge provision of compassionate care-based services and support. As restrictions are slowly lifting, we are seeing a marked increase in referrals for new care receivers, mostly for companionship and relief from isolation, but also for end of life care. Grief support group participants also benefit from a confidential, facilitated, and safe setting to connect with others. Additionally, we offer comprehensive educational workshops for the community about death, dying, illness, hospice, palliative care, advanced directives, dementia, grief, caregiving, and volunteering. Economically speaking, the number of donated volunteer hours has an enormous financial value and positive impact for the whole of Sitka. BHV also brings people together from all walks of life, creating a diverse network of support to strengthen our community.

**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 outreach data and numbers in all service areas, then comparing data and factoring in feedback. The areas we track include: 1) types of services 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 participants; 7) number of care receivers; 8) number of new referrals; 9) number and type of community groups, tribal citizens, civic groups, faith groups, social services, and medical organizations our volunteers are affiliated with; 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?**

Without a formal hospice organization and very few hospice-trained medical personnel, BHV-trained volunteers are the core providers of those services in Sitka. End-of-life care, grief support, and social companionship are vital human services for those who are facing death or experiencing isolation.

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

Brave Heart has experienced exponential growth in the organization's capacity to carry out our mission. BHV continues to sustain a steady number of volunteers and care receivers. Our Board and staff know the importance of building and maintaining a strong foundation to perpetuate the organization's ability to not only address this increase, but continue growing. The primary population we serve is elders, and according to both the *McDowell Group 2019 Sitka Economic Plan* and the *Sitka Comprehensive Plan for 2030*, the population of those age 65 and older—especially those over age 80—is expected to “grow rapidly” and will constitute nearly a quarter of Sitka’s population in 2030. Supportive care for our elders and providing them opportunities for social engagement is always a critical element for allowing them to “comfortably and safely age in place.” They deserve to live a dignified and engaged life, where they are seen and valued by all.

### **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 ability to apply for local, state and/or national grants. Consistent funding from the CBS demonstrates ongoing commitment to serving a vulnerable sector of our population. Support from the CBS, combined with the generosity of individual donors and local businesses, is also reassuring to those who receive our services. Our essential program services make significant contributions to managing elder and family care, and resolving caregiving dilemmas.

## **Organizational Capacity**

### **Track record (this or similar project delivery and management)**

Since 2001, BHV has provided compassionate care, companionship, respite, and education to elders and other Sitkans facing chronic or terminal illness, isolation, end of life and grief. Through collaborations with numerous service agencies, civic groups, faith groups, health organizations, and other nonprofits, BHV has created an outstanding network of caring volunteers (currently 214) to provide services completely free of charge. We also offer critical end-of-life and respite support that is not available from any other source in a community with a growing aging population and no formal hospice. For nearly two decades, we have served hundreds of citizens, through tens of thousands of hours, donated by hundreds of trained volunteers. We are a prime model of how a small, rural community can take care of its residents during the most challenging times of life.

We have successfully refined our mission, strengthened our core programs, and perfected our education services, which are respected throughout Alaska. While we continue to face some pandemic-related restrictions, we eagerly anticipate the day we can fully resume services and have unlimited contact with our care receivers, who rely on us for their emotional wellbeing. Until then, we continue to serve in the ways we are able, both directly and indirectly. We are also developing new online courses, as well as more online support groups and discussions about grief, loss, and isolation.

### **Community Support**

The community's responsiveness and generous support for BHV remains strong and steady. As BHV provides individuals with immediate and essential support, many of their friends and families become donors or volunteers themselves. Also, Sitka has a high number of nonprofits vying for the same funding resources, but because of our longevity and the unique vital services we provide, BHV is able to maintain a significant level of community support.

### **Board Attendance**

The BHV Board of Directors has eight members and attendance rate is 91.5%. Traveling is the main reason members miss monthly meetings.

### **List of Board Members and Officers**

Board Officers:	Michele Friedman, President Frederick Olsen Jr, Vice President Gloria Pies, Treasurer Jenny Kejka, Secretary
Members:	Shauna Thornton, Jerrod Galanin, Tonya Venneberg, and Elaine O'Neill
Honorary Members:	Father Dave Elsensohn, Aleeta Bauder, Jean Frank, and Sheri Mayo
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** **Profit & Loss Actual Year to Date vs Full Year Budget** January through December 2020

1/21/21

ccrual Basis

	Jan - Dec 20	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Income				
4000 · Donations	29,189	42,500	-13,311	69%
4010 · Fundraising	31,871	40,500	-8,629	79%
4020 · Grants	59,483	50,000	9,483	119%
Total Income	120,543	133,000	-12,457	91%
Cost of Goods Sold				
4100 · Credit Card Merchant Discount	933			
Total COGS	933			
Gross Profit	119,610	133,000	-13,390	90%
Expense				
5100 · Payroll Expenses	88,640	99,661	-11,021	89%
5300 · Professional Fees	5,520	7,000	-1,480	79%
5302 · Insurance	6,650	8,700	-2,050	76%
5303 · Telephone, Internet, Fax	3,030	1,800	1,230	168%
5400 · Supplies	4,530	2,300	2,230	197%
5500 · Training and Development	42	2,000	-1,958	2%
5600 · Promotion	1,137	2,975	-1,838	38%
66900 · Reconciliation Discrepancies	-0			
Total Expense	109,549	124,436	-14,887	88%
Net Ordinary Income	10,061	8,564	1,497	117%
Other Income/Expense				
Other Income				
4040 · Ameritrade Unrealized Gain/Loss	44,066			
4050 · Ameritrade Dividend Income	4,842			
4092 · Interest Income	80			
4095 · Ameritrade Investment Fees	-8			
Total Other Income	48,981			
Other Expense				
5700 · Other Expense	0	300	-300	0%
5901 · Bank Service Charges	70	1,000	-930	7%
Total Other Expense	70	1,300	-1,230	5%
Net Other Income	48,911	-1,300	50,211	-3,762%
Net Income	58,972	7,264	51,708	812%

# **BRAVE HEART VOLUNTEERS** **Balance Sheet Comparison to Prior Year** As of December 31, 2020

	Dec 31, 20	Dec 31, 19	\$ Change	% Change
<b>ASSETS</b>				
Current Assets				
Checking/Savings				
1001 - Northrim Checking 228	80,797	76,345	4,452	6%
1002 - Northrim Savings 031	29,698	29,642	56	0%
1003 - Petty Cash	28	28	0	0%
1004 - Ameritrade Investment Account	358,986	295,085	63,901	22%
Total Checking/Savings	469,509	401,100	68,409	17%
Total Current Assets	469,509	401,100	68,409	17%
<b>TOTAL ASSETS</b>	<b>469,509</b>	<b>401,100</b>	<b>68,409</b>	<b>17%</b>
<b>LIABILITIES &amp; EQUITY</b>				
Liabilities				
Current Liabilities				
Accounts Payable	0	383	-383	-100%
20000 - Accounts Payable	0	383	-383	-100%
Total Accounts Payable	0	383	-383	-100%
Other Current Liabilities				
2001 - Payroll Tax Liabilities	1,256	2,981	-1,725	-58%
2130 - COVID PPP Loan	11,545	0	11,545	100%
Total Other Current Liabilities	12,801	2,981	9,820	329%
Total Current Liabilities	12,801	3,364	9,437	281%
Total Liabilities	12,801	3,364	9,437	281%
Equity				
3001 - Retained Earnings	38,750	103,040	-64,290	-62%
3200 - Endowment	358,986	295,085	63,901	22%
32000 - Unrestricted Net Assets	0	0	0	100%
Net Income	58,972	-389	59,361	15,263%
Total Equity	456,708	397,736	58,972	15%
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>469,509</b>	<b>401,100</b>	<b>68,409</b>	<b>17%</b>

07/12/21  
Accrual Basis

**BRAVE HEART VOLUNTEERS**  
**Profit & Loss Budget Overview**  
January through December 2021

	<u>Jan - Dec 21</u>
Ordinary Income/Expense	
Income	
4000 · Donations	
4001 · Individuals	20,000
4002 · Businesses	5,000
4003 · Faith Groups	0
4004 · Pick. Click. Give.	5,000
	<u>30,000</u>
Total 4000 · Donations	30,000
4010 · Fundraising	
4013 · Bowls	10,000
4015 · Fundraisers Other	30,000
	<u>40,000</u>
Total 4010 · Fundraising	40,000
4020 · Grants	
4021 · Foundation Grants	40,000
4022 · Government Grants	10,000
	<u>50,000</u>
Total 4020 · Grants	50,000
Total Income	<u>120,000</u>
Gross Profit	120,000
Expense	
5100 · Payroll Expenses	
5101 · Salaries & Wages	88,910
5102 · Payroll Taxes	7,691
5103 · Direct Deposit Fees	91
	<u>96,692</u>
Total 5100 · Payroll Expenses	96,692
5300 · Professional Fees	
5304 · Accounting	3,700
	<u>3,700</u>
Total 5300 · Professional Fees	3,700
5302 · Insurance	7,237
5303 · Telephone, Internet, Fax	1,920
5400 · Supplies	
5401 · Office Supplies	1,400
5402 · Companionship Supplies	200
5405 · Fundraiser Expense	1,000
5400 · Supplies - Other	300
	<u>2,900</u>
Total 5400 · Supplies	2,900
5500 · Training and Development	
5502 · Travel	1,000
5505 · Conference & Training	1,000
	<u>2,000</u>
Total 5500 · Training and Development	2,000
5600 · Promotion	
5503 · Membership and Dues	246
5601 · Postage	100
5602 · Printing	500
5603 · Advertising & Promotion	900
	<u>1,746</u>
Total 5600 · Promotion	1,746
Total Expense	<u>116,195</u>
Net Ordinary Income	<u>3,805</u>
Net Income	<u><u>3,805</u></u>

**Brave Heart Volunteers  
Grants Received or Pending**

<b>2021</b>				
<b>Name</b>	<b>Value</b>	<b>Date Closed</b>	<b>Status</b>	
Federal PPP Loan 2nd Draw (Grant)	\$17,903	2/22/21	Awarded	
Sitka AK Permanent Charitable Trust	\$7,395	4/28/21	Awarded	
Sitka Rotary Club	\$824	5/18/21	Awarded	
ATIAF-Royal Caribbean	\$7,500	7/7/21	Awarded	
<b>2020</b>				
<b>Name</b>	<b>Value</b>	<b>Date Closed</b>	<b>Status</b>	
Foundation for End of Life Care	\$5,000	1/21/20	Awarded	
Sitka AK Permanent Charitable Trust	\$8,750	4/13/20	Awarded	
Federal PPP Loan (Grant)	\$11,545	5/17/20	Awarded	
Sitka Legacy Foundation	\$1,500	5/28/20	Awarded	
Foundation for End of Life Care	\$4,000	6/17/20	Awarded	
Sitka Rotary Club	\$1,000	6/26/20	Awarded	
C&B of Sitka CARES Act Round 1	\$5,000	10/17/20	Awarded	
C&B of Sitka General Fund	\$8,167	12/8/20	Awarded	
C&B of Sitka CARES Act Round 2	\$28,500	12/15/20	Awarded	



**IRS** Department of the Treasury  
Internal Revenue Service

P.O. Box 2508  
Cincinnati OH 45201

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

BODC: TE

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

405

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](http://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 7, 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 2022

## CBS Liabilities Form

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

Organization Name: Brave Heart Volunteers

- Property Tax

Justin Harris  
Justin Harris, Supervisory Senior Accountant  
747-1853

- Sales Tax

Justin Harris  
Justin Harris, Supervisory Senior Accountant  
747-1853

- Municipal Leases

Erica Stocker  
Erica Stocker, Utility/Harbor Billing Clerk  
747-1843

- Loan/Promissory Note

Denise Salter 7/12/2021  
Denise Salter, Controller  
747-1836

- Utilities N/A

Erica Stocker  
Erica Stocker, Utility/Harbor Billing Clerk  
747-1843

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

