

Organization / Agency Information

Organization/Agency Name: Seniors In Service Of Tampa Bay Inc		
Physical Address: 1306 W Sligh Ave, Tampa, FL 33604 1306 W Sligh Ave, Tampa, FL 33604		
Mailing Address: 1306 W Sligh Ave Tampa FL 33604		
CEO or Director & Title: Ms Tammy Criollo, President & CEO		
Phone: (813) 932-5228	Fax: (813) 932-9604	Email: Tammy Criollo Tel: (813) 932-5228 Fax: (813) 932-9604 tcriollo@seniorsinservice.org
Contact Person & Title: Donna Killoren, Community Outreach Director		
Phone: (813) 932-5228	Fax: (813) 932-9604	Email: dkilloren@seniorsinservice.org
Web Site Address: http://seniorsinservice.org/		Tax ID: 592422975

Program / Grant Information

Program Area: Health

Program/Project Name: Senior Companion Program			Amount of Grant Requested: \$25,000
Total Organization Budget: \$2,095,116	Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100): 95%	Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): 5%	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 5%
Purpose of Grant Request (one sentence): Provide services for low-income, isolated elders who have no effective care/support from family or friends so they can age in place.			
Program Start Date (Month and Year): 10/1/2019		Program End Date (Month and Year): 9/30/2020	
Gimbel Grants Received: List Year(s) and Award Amount(s) 2018 \$25,000 2015 \$25,000 2014 \$25,000 2012 \$25,000			

Organization / Agency Information

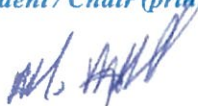
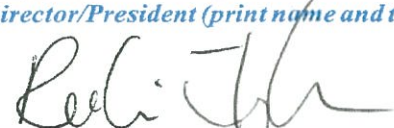
Organization/Agency Name: Seniors in Service of Tampa Bay, Inc.		
Physical Address: 1306 W Sligh Ave		City/State/Zip Tampa, FL 33604
Mailing Address: 1306 W Sligh Ave		City/State/Zip Tampa, FL 33604
CEO or Director: Robin Ingles		Title: CEO
Phone: 813-368-6746	Fax: 813-932-9604	Email: ringles@seniorsinservice.org
Contact Person: Donna Killoren		Title: Director of Community Outreach
Phone: 813-760-7636	Fax: 813-932-9604	Email: dkilloren@seniorsinservice.org
Web Site Address: www.seniorsinservice.org		Tax ID: 592422975

Program / Grant Information

Interest Area: ☐ Animal Protection ☐ Education ☐ Environment ☐ Health ☐ Human Dignity

Program/Project Name: Senior Companion Program			Amount of Grant Requested: \$25,000
Total Organization Budget: \$2,067,899	Per 990, Percentage of Program Service Expenses (Column B / Column A x 100): 95	Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100): 5	Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100): 5
Purpose of Grant Request (one sentence): We are seeking funding to provide services for low-income, isolated elders who have no effective care/support.			
Program Start Date (Month and Year): October 2019		Program End Date (Month and Year): September 2020	
Gimbel Grants Received: List Year(s) and Award Amount(s) 2018 \$25,000; 2015 \$25,000; 2014 \$25,000; 2012 \$25,000			

Signatures

Board President / Chair (print name and title): Mark Hall, Board Chair	
Signature: 	Date: 6/17/19
Executive Director/President (print name and title): Robin Ingles, CEO	
Signature: 	Date: 6/17/19

2019 S.L. Gimbel Foundation Fund APPLICATION

Narrative

I. Organization Background

Founded in 1984, Seniors in Service is a fiscally conscious, financially stable non-profit recognized for our track record of successful outcomes. Our mission is to provide solutions to community challenges by engaging volunteers aged 55+. Our proven programs help disadvantaged children, frail elders, overwhelmed caregivers, disabled adults, struggling veterans, hungry families and the homeless. Our aged 55+ volunteers also benefit from staying active and connected with a true sense of purpose. Our outstanding ability to engage 600 volunteers annually in collaboration with 150+ community partners enables us to help 3000+ underserved individuals. During 33+ years of service, we have provided over 5 million hours of community assistance with fair market value exceeding \$76,000,000. Our Independent Audit shows over 93% of each dollar goes to program services - a great return on investment for our community!

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Organizational Accomplishments:

- Selected by Juvenile Welfare Board of Pinellas to significantly expand Foster Grandparent Program impact, with 720 additional children (40 additional classes) receiving tutoring/mentoring.
- Children's Board of Hillsborough County funded expansion of Readers in Motion from Kindergarten only to include 1st grade
- Chosen by AmeriCorps to launch Operation: Veteran Connect - their first program in Florida exclusively for veterans
- Board Members Herma White and Marina Choundas accepted to Harvard's Governing for Non-Profit Excellence
- Board Member Dr. Valerie Brimm accepted to Harvard Graduate School of Education Family Engagement Institute
- 2018 Finalist: WEDU Be More Brilliant Award
- 2017 Winner: WEDU Be More Knowledgeable Award
- 2017 Finalist: WEDU Be More Unstoppable Award (Non-profit of the Year)
- 2017 Tampa Bay Business Journal Non-Profit of the Year in Public & Societal Benefit – Finalist
- 2017 Winner: Department of Education Community Involvement Exemplary Program Award
- 2017 City of St. Petersburg Senior Hall of Fame
- 2017 Service to Mankind Award from Tampa East Sertoma
- 2015 & 2016 Hillsborough County Board of County Commissioners Commendation
- Presidential Lifetime Achievement Awards for 30+ volunteers 4,000+ service hours
- Featured on ABC Action News <http://bit.ly/2017BeMorePTB>

- Featured on News Channel 8 <http://bit.ly/2017FGPGayle>
- Presented “Fundamentals of Engaging and Retaining Volunteers” to the 2018 National Convening of Senior Corps program grantees in Washington D.C.
- 2018 Community Impact: 1)Readers in Motion: 82% of 1st graders who received intensive literacy interventions were reading on grade level at the end of the program year; 2)Foster Grandparent Program: 97% of children served improved literacy, 99% improved social/emotional skills (evaluated by their teacher, NOT Seniors in Service); 3)Senior Companion Program: 91% of clients reported improved quality of life; 4)Operation:Veteran Connect: 106 Volunteers served 960 veterans, enabling successful launch of Veterans Hospital’s Whole Health initiative.
- Launched new collaboration with Tampa General Hospital to reduce hospital readmissions using best practices from our proven Senior Companion Program.
- Executed our largest ever fundraiser (in revenue and attendance) with documentary film screening of “The Longest Game”, celebrating active aging.
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- Board Members Herma White and Marina Choundas attended Harvard’s Governing for Non- Profit Excellence. Dr. Valerie Brimm attended Harvard Graduate School’s Education Family Engagement Institute
- 2019 Juvenile Welfare Board Cooperman-Bogue KidsFirst Award
- 2018 Finalist: WEDU Be More Brilliant Award
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- 2016 Hillsborough County Board of County Commissioners Commendation
- Presidential Lifetime Achievement Awards for 30+ volunteers 4,000+ service hours
- Featured on: ABC Action News (<http://bit.ly/2017BeMorePTB>) and News Channel 8 (<http://bit.ly/2017FGPGayle>)

Program Activities:

We provide solutions to community challenges by engaging volunteers aged 55+. We help underserved children, frail elders, disabled adults, overwhelmed caregivers, struggling veterans and military families.

- Foster Grandparent Volunteers mentor and tutor the most challenged children in the lowest-performing schools in Hillsborough and Pinellas Counties. All are Title I schools where over 75% are Economically Disadvantaged. Primary activities include one-on-one literacy tutoring, social/emotional mentoring.
- Readers in Motion enriches the Foster Grandparent experience, building literacy through science exploration and parental engagement in the Lowry Park Neighborhood of Hillsborough County. The population is primarily Hispanic with 93% Economically Disadvantaged (on Free/Reduced Lunch). Primary activities include tutoring/mentoring, classroom visits by animal experts, Family Engagement activities/events.
- Senior Companions provide companionship to frail elders and respite to overwhelmed caregivers throughout Hillsborough County to help them remain living at home, with dignity. Well over 65% of clients are Hispanic or Black and predominantly low-income with no effective support from family/friends. Activities are customized based on client needs such as companionship, errands, housekeeping, mentally stimulating games, respite.
- Operation: Veteran Connect guides veterans to take charge of their own wellness through the VA’s Whole Health initiative. We serve veterans served at James A. Haley Veterans Hospital and Clinics, most of whom are low-to-moderate income and reside in Hillsborough County. Activities include helping veterans navigate Whole Health resources offered by both the VA and outside community, going beyond clinical care to include all aspects of wellness such as: fitness, education, employment, financial health, VA benefits.
- Our Retired and Senior Volunteer Program (RSVP) helps other local non-profits achieve their mission by providing volunteers for “done-in-a-day” or regularly scheduled projects throughout Hillsborough County. The focus of this proposal is Readers in Motion.

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II. Project Information:

A) Statement of Need

We serve low-income elders in Hillsborough County where the aging population grew 40% from 2000-2010 and is projected to almost double by 2050. 18.7% are 65+, well above the U.S. average (Forbes-2016). 90% want to age in place, but 25% are 125% poverty level or below, threatening their ability to do so (FL Dept Elder Affairs-2017). 51% live alone, experiencing chronic loneliness which studies say result in higher risk of premature decline/death than smoking! Ongoing demands make caregivers subject to depression/exhaustion, adding \$726M to Florida’s health costs (Alzheimer’s Association-2016). Yet budget cuts/changing priorities from long-term funders (City of Tampa/Hillsborough County/United Way) jeopardizes our ability to add new clients and also to continue serving existing clients who desperately need ongoing support.

In 2018 our waitlist had 446 prospective clients. Many are removed from our waitlist after years of waiting due to insufficient funding. Without support, some cannot remain at home. Others pass away while waiting. Many are on the brink of costly nursing home care, which they cannot afford. Most don’t have family nearby; others have overwhelmed family caregivers. They become more at-risk every day. They get meals delivered but need companionship to ensure it gets eaten. They have deepening depression or forgetfulness. A Companion Volunteer could help ensure that vital medications are taken on schedule. With our new TelePals, regular phone calls can alleviate loneliness that jeopardizes health/independence for those waitlisted and for existing clients who need more support. Each senior who remains at home represents significant community savings. Annual impact per senior is estimated at \$32,700 for assisted living, \$90,155 for private nursing homes (Genworth-2013). Respite also has economic benefits. Caregivers often forgo \$300,000+ in lost wages/benefits, costing employers \$17+ billion/year in lost productivity.

True Stories:

After his stroke, Everett couldn’t remember simple words, couldn’t read or write and had no local family support. Until Volunteer Asleen arrived. Asleen initially read books aloud, reminding him of words he’d forgotten. She learned to understand him even when he couldn’t complete sentences. She wrote letters on his behalf and he’d re-write them. Everett initially created grocery lists made of pictures. She’d guess what the item was, and if she got it wrong, she’d return to the store; but she didn’t mind. After 3 years of Asleen’s ongoing support, Everett can now write his lists, remains living at home and considers Asleen his family.

After 65 years together, Daisy and Peter were still best friends. When Peter’s dementia turned Daisy into fulltime caregiver, she became emotionally and physically exhausted. With private in-home care cost-prohibitive, she found Seniors in Service. Volunteer David shares Peter’s love for dominoes. Peter loves to talk; David listens.

Daisy trusts David to watch Peter while she runs errands/meets friends and appreciates his help with chores. Yet David insists he's the one who benefits most.

Without your funding frail elders like Everett will be unable to age in place. Never-ending demands on sweet caregivers like Daisy will jeopardize the ability for either spouse to remain living at home.

B) Project Description

Our Senior Companion Program pairs low-income, isolated elders with highly-trained volunteers for intensive, ongoing in-home services. Clients are referred by Senior Living partners. Program staff assess clients' needs, matching them with volunteers based on needs/culture/skills. Clients get help with activities of daily living, companionship and a watchful eye in case they need extra care, all at no cost to them. Studies show loneliness eclipses obesity and even smoking for premature decline, and for some clients, their volunteer is the only human connection they have. Volunteers build rapport, engage in mentally-stimulating conversation, read to clients, help with chores/meal preparation, run errands, provide guidance in nutrition and medicine compliance. Caregivers get respite to prolong their health and ability to care for their loved one. Periodic reassessments, staff visits, activity logs and surveys measure success. 91% of clients report that their volunteer helps them remain at home.

What sets us apart is our proven ability to not only manage but to truly engage volunteers. Volunteers are low-income seniors who benefit by staying active and purposeful. They receive Level-2 background checks, mileage, insurance while on duty and small stipend to cover expenses. They serve 15-30 hours/week helping 2-4 clients. Volunteers attend Orientation (20 hours), On-the-Job Training shadowing an experienced volunteer (40 hours), and monthly 4-hour in-service trainings. Expert training provided in English/Spanish cover topics like Effective Communication; Interactive Caregiving; HIPPA; Dementia; Elder Fraud. Experienced Volunteer Team Leaders advise newer volunteers. Ongoing appreciation events enable us to retain volunteers who serve 5, 10, 15+ years, often with the same client(s).

We continually enhance services to increase impact. Our Healthy Habits for Adults initiative enriches volunteer training, enabling them to empower clients (and themselves!) to lead healthier lives. The research-based curriculum includes: Healthy recipes on a budget; Food labels; Limiting salt/sugar/fat; Increasing fruits/vegetables. In addition, our TelePals initiative is an innovative, cost-effective way to provide social connection clients need to age in place. Trained volunteers are matched with clients who share common interests/language. They commit to 15-minute calls to clients multiple times/week. Frequency depends on client needs. Regular calls check clients' well-being, encourage medical/diet compliance, discuss common interests and tell them: "You have a friend who cares". For some, it's the only conversation they'll have in a day. Clients complete simple registration with contact information in case a problem arises. Program staff perform background checks and train volunteers on: Client confidentiality; Call procedures/logs; Active listening; Topics on aging. New volunteers observe experienced peers before calling alone. Volunteers ask tactful questions, communicate cheerfully about daily life and refer concerns to staff/other agencies. This early intervention can delay/prevent nursing home placement, which is MUCH more costly. In addition to expanding services for in-home Companion clients, it's also an effective way to serve those waitlisted for in-home Companionship or who don't require such intensive in-home intervention. Plus studies show volunteering leads to greater longevity and lower rates of depression/chronic disease. Our TelePal Call Center promotes socialization among senior-aged Volunteers, who also benefit from interacting with clients on the phone.

C) Project Goal, Objectives, Activities & Expected Outcomes

Project Goal:

Each year, ensure all low-income, isolated elderly residents in Hillsborough County who want to age in place will be able to remain living at home by providing ongoing support services customized to meet each individual client's assessed needs.

Project Objectives:

Ensure at least 250 low-income, isolated elderly residents in Hillsborough County who want to age place are able to remain living at home through the end of the program year by matching them with highly-trained, culturally relevant volunteers who provide ongoing in-home companionship and/or regular telephone reassurance services that meet each individual client's assessed needs.

Program Activities:

We provide solutions to community challenges by engaging volunteers aged 55+. We help underserved children, frail elders, disabled adults, overwhelmed caregivers, struggling veterans and military families.

- Foster Grandparent Volunteers mentor and tutor the most challenged children in the lowest-performing schools in Hillsborough and Pinellas Counties. All are Title I schools where over 75% are Economically Disadvantaged. Primary activities include one-on-one literacy tutoring, social/emotional mentoring.
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The focus of this proposal is Readers in Motion.

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The focus for this proposal is our Senior Companion Program.

Expected Outcomes:

250 clients will report that they are able to remain living at home due to services provided during the program year by their Companion and/or TelePal Volunteer(s).

Evaluation:

5. Evaluation

The evaluation process measures the impact our volunteers have on ensuring that their clients are able to remain living at home. Annual Client Impact Surveys report client's response to questions that ask about how the volunteer improved their quality of life, improved social connections and/or improved ability to remain living independently.

We will track our role in ensuring 250 clients are able to remain living at home and account for successes or lower numbers of clients served by the program. Using Neworg data base management and tracking system, we will generate reports using data from Client Impact Surveys, Quality Assurance Evaluations of Volunteer Performance, Volunteer Activity Logs, Volunteer Timesheets and Volunteer Satisfaction Surveys: # of clients served, # clients who respond positively on Client Impact Survey, # volunteers who served, # volunteer service hours.

D) Timeline

Provide a timeline for implementing the project. State the start date and ending date of the project, include timeframes for specific activities, as appropriate.

10-1-19 – 9-30-20:

- Establish/Maintain Program Database & Compliance Files

10-1-19 – 11-31-19:

- Volunteer Community Outreach/Recruitment/Screening (2-4 activities/month at senior facilities, churches, community groups)

11-1-19 – 12-31-19:

- Volunteer Orientation/Training (20-hours Orientation, 20-hours On-the-Job-Training shadowing experienced volunteer)

10-1-19 – 3-31-20:

- Client Assessments determine services needed (review pre-assessments of waitlist prospects, complete in-home assessments, meetings with stakeholders at senior living facilities)

11-1-19 – 1-31-20:

- Volunteer Placements (meetings with volunteer, client/caregiver to match/assign/place)

11-1-19 – 9-30-20:

- Companion and TelePal Services Provided (regular in-home client visits and/or phone calls following plan established at assessment/placement)

- Placement Check/Reassurance (Monitor volunteer/client/caregiver match to ensure good fit. Maintain constant review of Volunteer Activity Logs for any indication of change. Repeat previous steps if needed.)

- Communications - regular communications between staff/volunteers/clients (phone, emails, activity sheets)

- Develop/deliver volunteer training (monthly)

- Volunteer timesheet/expense processing

- Volunteer Appreciation/Retention activities

5-1-20 – 9-30-20:

- Annual Data Collection/Recording/Evaluation (Client Impact Surveys assess impact to client/caregiver. Quality Assurance Evaluations assess volunteer performance. Volunteer Surveys performed by independent community members assess Volunteer Satisfaction.)

- Funder Reports

E) Target Population

Who will this grant serve? How many people will be impacted? Provide a breakdown: Number of Children, Youth, Adults, Seniors, Animals.

This grant will enable us to serve 250 frail elders and caregivers who want to age in place but lack the support or resources to do so. Our clients represent a very low-income population: 65% have annual incomes below 30% of Area Median Income (AMI), 28% between 30%-50% AMI. We serve a diverse, predominantly minority population: 14% Caucasian, 44% African-American, 40% Hispanic, 2% other; 73% Women & 27% Men.

This grant will also serve 75 highly-trained volunteers, all low-income seniors who benefit from increased activity/purpose, delaying their own need for services.

F) Projects in the Community

How does this project relate to other existing projects in the community? Who else in the community is providing this service or has a similar project? Who are your community partners (if any)? How are you utilizing volunteers?

We are the exclusive provider of the Senior Companion Program in Tampa Bay, helping low-income clients, caregivers and seniors who volunteer. Our nationally recognized, AHCA-registered (Agency for Health Care Administration) program is a proven model of intense volunteerism, delivering continuous support to frail elderly at no charge to them. Other companies offer fee-based companionship/homemaker services that our clients cannot afford. Our Level-2 background screenings, pre-service On-the-Job-Training and mandatory monthly trainings featuring timely elder-centric topics make our volunteers on-par (if not exceeding) qualifications of services that charge \$20+/hour. Our expertise matching volunteers and clients, combined with ongoing recognition/appreciation means many volunteers serve the same clients for decades.

Our new TelePals also fulfill genuine community need. A comparable no-charge telephone reassurance provided by Crisis Center of Tampa Bay has been discontinued, leaving a huge hole in senior support. We collaborate with Eskaton, using best practices/program materials from their success implementing telephone reassurance in California.

Other community partners refer clients (HUD Senior Housing, Senior Connection Center, Hillsborough County Aging Services, 211) and provide training/support (University of South Florida, Alzheimer's Association, Hillsborough County Anti-Drug Alliance, Suncoast Credit Union, Physician's First Choice and more).

Local funders: TECO, McDonald's, USAA, Humana, TD Bank and more.

G) Use of Grant Funds

How will you use the grant funds?

Grant funds will provide proven, ongoing companionship services for low-income, isolated elderly Hillsborough County residents who have no effective care/support from family/friends so they can remain independent. Despite the urgent need, budget cuts/changing priorities have significantly reduced support from long-time funders. Grant funds are needed to expand the number of clients served and to even continue serving existing clients who desperately need ongoing support.

Grant funds will be used to support a total of 250 frail elders and caregivers with intensive, ongoing companionship, homemaker and respite services. We will also provide proven, cost-effective enhancements to existing services to increase impact with our Healthy Habits for Adults initiative. In addition, our new TelePals telephone reassurance provides a cost-effective way for us to add 50 new isolated elders who need support while enhancing support for 200 existing clients.

Grant funds will enable us to engage 75 highly-trained Volunteers, all low-income seniors who benefit from increased activity/purpose, delaying their own need for services. Those who qualify earn a small stipend to cover costs of volunteering.

TRIPLE impact for the community development dollar! 1) support for elderly client, 2) caregiver respite, 3) sense of purpose/small stipend for low-income volunteer.

XIV.

Project Future

A) Sustainability

Seniors in Service has a 35-year track record for helping low-income, isolated frail elders remain independent, generating over 1,700,000 hours of elder companionship support. Through support from the Corporation for National and Community Service, United Way Suncoast, Community Foundation of Tampa Bay, Senior Connection Center, Humana, United Healthcare, Suncoast Credit Union, TD Bank, TECO Energy and more, Seniors in Service remains the exclusive provider of the Senior Companion Program Hillsborough County. We aggressively approach new funders whose mission aligns with helping underserved elders age in place. Our strategic marketing efforts engage community influencers – including our engaged Board. We own the real estate debt-free at our Tampa headquarters saving over \$50,000 annually in mortgage payments. 93% of each dollar goes to program services. Our restricted cash is sufficient to cover 4 months of operating expenses. 100% of our Board of Directors make annual personal financial donations and support fundraising activities.

IV. Governance, Executive Leadership and Key Personnel/Staff Qualifications

A) Governance

Our highly engaged Board establishes strategic vision of the organization. They began 2018 at their annual retreat, where they strategically reworded our mission statement to better align with our growing community impact. Through its committees, our board maintains oversight over the organization. The Executive Committee serves as the audit committee and sets, reviews and prepares the annual performance review of the CEO and makes compensation recommendations. The Fundraising/Development Committee supports the President/CEO and leads the Board of Directors in achieving Development goals. The Finance and Investment Committee provides oversight and review of the financial reporting of the organization. The Governance Committee oversees the recruitment, nomination and development of Board members. 100% of our board members make personal financial contributions to the organization and connect us to sources of additional community support. As Director of Strategic Partnerships for Pinellas County Schools, Board Member Dr. Valerie Brimm connects us to school district leadership and, after attending Harvard Graduate School of Education Family Engagement Institute, she shares best practices in parent engagement. Both Board Chair Herma White and Treasurer Marina Choundas share lessons learned after attending Harvard University's prestigious Governing for Non-Profit Excellence.

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B) Management

Describe the qualifications of key personnel/staff responsible for the project.

CEO Robin Ingles (B.S. Accounting/Wake Forest University) brings 20+ years in Finance, Marketing, Sales, Operations. Lured as a volunteer in 2015, her passion for our mission led to appointment as Marketing/Development Director. After accounting roles in the professional sports arena (NASCAR, PGA Tour, Controller of Tampa Bay Lightning), she served as President of a 22-unit auto-repair franchisor before launching her own boutique advertising agency. Selling her business inspired her to contribute to the non-profit sector. She was appointed CEO in January 2019.

Programs Director Cathie Schroder has managed our Programs/Compliance for 7 years. Her previous 18 years in Operations/Facilities Management enable her to lead program staff and build relationships with volunteers/community partners. She recently led automation of our volunteer stipend process, resulting in significant savings.

Program Manager Glarisol Traspalacios (M.S. Human Services Management & Nursing Assistant Certification) brings 17+ years working with older adults in social service, community outreach, programs, volunteer management. Since 2009 her passion for helping older adults continues to advance our mission.

Our engaged volunteer Board of Directors oversee all aspects of the organization. Board Chair Mark Hall has served on our board since 2012. Passionate about our mission, he actively participates in Governance & Executive Committees.

S.L. Gimbel Foundation APPLICATION

Organization Name:

Seniors in Service of Tampa Bay, Inc.

V. Project Budget and Narrative (Do not delete these instructions on your completed form).

A) **Budget Table:** Provide a detailed line-item budget for your **entire** project by completing the table below. Requested line items should be limited to Ten (10) line items. The less the better.

A breakdown of specific line item requests and attendant costs should include:

- 1) Line item requests for materials, supplies, equipment and others:
 - a. Identify and list the type of materials, supplies, equipment, etc.
 - b. Specify the unit cost, number of units, and total cost
 - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff compensation, benefits: **Do not use FTE percentages.**
 - a. Identify the position; for each position request, specify the hourly rate and the number of hours (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
 - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)
- 3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above: Provide rate of pay per hour and number of hours.

Line Item Request	Line Item Description (Maximum two lines)	Support From Your Agency	Support From Other Fundors	Requested Amount From Gimbel/TCF	Line Item Total of Project
1. Salary/Personnel: Program Manager	40hrs/wk x 52 wks x \$25/hr = \$52,000		47000	5000	52000
1. Benes & Taxes: Program Manager	\$52,000 x 30% taxes/benefits = \$15,600		15600	0	15600
1. Salary/Personnel: Program Coordinator1	40hrs/wk x 52 wks x \$16.50/hr = \$34,320		29320	5000	34320
1. Benes & Taxes: Program Coordinator1	\$34,320 x 30% taxes/benefits = \$10,296		10296	0	10296
1. Salary/Personnel: Program Coordinator2	40hrs/wk x 52 wks x \$16.50/hr = \$34,320		29320	5000	34320
1. Benes & Taxes: Program Coordinator2	\$34,320 x 30% taxes/benefits = \$10,296		10296	0	10296
2. Program Expenses	Mileage reimbursements, Training		78070	10000	88070
3. Volunteer Expenses	Volunteer Stipends, Recognition, Background Screenings, Insurance		152876	0	152876
4. Occupancy Costs	Building Maintenance and Utilities		5239	0	5239
5. Operating Costs	Financial Audit, Supplies, Telecommunications, Leases		15675	0	15675
TOTALS:		\$0	\$393692	\$25000	\$418692

B) Narrative: The budget narrative is the justification of “how” and/or “why” a line item helps to meet the project deliverables. Provide a description for each line item request as necessary. Explain how the line item relates to the project. If you are requesting funds to pay for staff, list the specific duties of each position. See attached SAMPLE Project Budget and Budget Narrative

1. Personnel: We are requesting a total of \$15,000 in support of salaries & benefits.

Program Manager: Manages all Senior Companion Program activities including: Volunteer engagement; Client service delivery; Compliance. Directs program staff, volunteers, interns. Ensures financial & program objectives are met. Builds community partnerships for client/volunteer referrals, volunteer training and service enhancements such as our new Healthy Habits for Adults and TelePals initiatives. 40hrs/wk x 52 weeks x \$25/hr = **\$52,000** + 30% taxes/benefits **\$15,600** = \$67,600.

2 Program Coordinators:

Companion Services Coordinator: oversees activities of 60 Companion Volunteers who each serve 15-30 hours/week providing in-home services to 2-4 low-income, isolated elderly clients who are in desperate need of intensive, ongoing support to remain at home. Activities include: Volunteer Engagement; Client in-home Assessments/Re-assessments, Volunteer Placements; Monitoring Client/Volunteer Progress, Data Collection, Maintaining Database/Files. 40hrs/wk x 52x \$16.50/hr = **\$34,320** + 30% taxes/benefits **\$10,296** = \$44,616

TelePal Services Coordinator: oversees activities of 15 TelePal Volunteers who provide Telephone Reassurance to 2-5 low-income, isolated elderly clients in desperate need of frequent social connection/wellness checks to remain at home. Activities include: Supervise TelePal Call Center at Seniors in Service facility plus all activities listed for Companion Coordinator. 40hrs/wk x 52x \$16.50/hr = **\$34,320** + 30% taxes/benefits **\$10,296** = \$44,616

It takes considerable effort to recruit, train, place, retain, recognize volunteers who provide necessary levels of commitment. Coordinators deliver Orientations (20 hours ea.) to teach volunteers about program requirements and community resources to help clients. Coordinators monitor volunteer OJT (40 hours) shadowing an experienced volunteer. Coordinators develop/deliver monthly 4-hour bilingual trainings to arm volunteers with resources. Coordinators Retain/Recognize volunteers with ongoing activities such as: annual Volunteer Recognition Luncheon in Dec. with Volunteer of the Year awards, Tenure Certificates, gifts/prizes; Promotion of exceptional volunteers to Team Leaders who advise newer volunteers; Volunteer Highlights in newsletters/social media; Thank you notes/birthday cards; Coordinating Volunteer Surveys by independent community members.

2. Program Expenses: We are requesting a total of \$ 10,000 for Program Expenses:

Mileage reimbursement: Staff mileage for travel to client homes, volunteer recruiting sites, volunteer training: \$0.50 per mile X 15 miles per staff per month = \$7.50 X 12 months = \$90 X 3 staff (Program Manager, 2 Program Coordinators) = \$270. Companion Volunteer mileage for travel to client homes, training: \$0.50 per mile X 55 miles/wk (avg) per volunteer X 52 weeks X 60 volunteers = \$ 85,800. Total of both = \$ 86,070.

Training: We are enhancing our volunteer training by acquiring the Healthy Habits for Adults curriculum, a proven, national, research-based curriculum from Oasis that provides nutrition/fitness information geared for older adults. Volunteers will use information to empower clients and also themselves to adopt healthier lifestyles. Cost: \$2,000. Total Program Expenses: **\$88,070**

3. Volunteer Expenses: all volunteers receive background checks on the National Sex Offenders Public Website and Level 2 Federal Background Checks, including fingerprinting. All volunteers receive supplemental liability coverage while volunteering. Low income volunteers are eligible to receive a small stipend to support them while they serve the community. We provide recognition of volunteer service in many ways, including years of service awards, leadership opportunities, celebrations, competitions and trainings.

4. Occupancy Costs: Seniors in Service owns its building thanks to the generosity of contributors so our occupancy costs are low. They consist of estimated building repairs and maintenance (HVAC, plumbing, security, etc.) and utilities (water, electric, lawn care, janitorial, pest control).

5. Operating Costs: consists of our annual financial audit, general office supplies, telephone and internet access, copier and postage meter leases.

We have committed support from the Corporation for National and Community Service. Their SeniorCorps programs support the bulk of our services. Additional support from Gimbel will help us meet a match requirement that leverages this national funding commitment.

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VI. Sources of Funding: Please list your current sources of funding and amounts.

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
Corporation for National and Community Service	\$259,769
United Way Suncoast	\$20,389
Senior Connection Center	\$3,000
Mabel & Ellsworth Simmons Charitable Foundation	\$2,500
	\$
	\$
	\$
	\$

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
S.L. Gimbel Foundation	\$25,000	10/17/19
Florida Blue Foundation	\$84,670	10/31/19
Sun Life Financial	\$25,000	07/31/19
	\$	
	\$	
	\$	

Diversity of Funding Sources: A financially healthy organization should have a diverse mix of funding sources. Complete those categories that apply to your organization using figures from your most recent fiscal year.

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$152,722	8.2%	Program Fees	\$0	0%
Fundraising/Special Events	\$38,145	2.1%	Interest Income	\$2,751	0.2%
Corp/Foundation Grants	\$652,937	35.2%	Other:	\$40,468	2.2%
Government Grants	\$966,459	52.1%	Other:	\$	%

Notes:

Other: \$40,468 - In Kind

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VII. Financial Analysis

Agency Name: Seniors in Service of Tampa Bay, Inc.

Most Current Fiscal Year (Dates): From: January 1, 2017 To: December 31, 2017

This section presents an overview of an applicant organization's financial health and will be reviewed along with the grant proposal. Provide all the information requested on your **entire organization**. Include any notes that may explain any extraordinary circumstances. Information should be taken from your most recent 990 and audit. **Double check your figures!**

Form 990, Part IX: Statement of Functional Expenses

1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$ 1,794,620	\$ 1,704,853	\$ 89,767	\$ 0

2) Calculate the percentages of Columns B, C, and D, over A (per totals above)

- Program services (B) – A general rule is that at least 75% of total expenses should be used to support programs
- Management & general administration (C) – A general rule is that no more than 15% of total expenses should be used for management & general expenses
- Fundraising (D) – A general rule is that no more than 10% of total expenses should be used for fundraising

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	95%	5%	0%

3) Calculate the difference between your CURRENT year budget for management & general expenses and your previous management & general expenses per your 990 (Column C)

Percentage of Organization's <u>Current</u> Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
5%	5%	0%

If the differential is above (+) or below (-) 10%, provide an explanation:

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Quick Ratio: Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$222,078	\$201,442	98,022	4.32

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$18,394	\$36,202

Notes:

[illegible]

SAMPLE Budget Comparison

	Actuals		Budget		Variance	
	Most Recently		Projections			
	Completed Year		Current Year			
	20 18		20 19			
Income						
Individual Contributions	73,081	-	73000	-	-81	-
Corporate Contributions	114,039	-	111000	-	-3039	-
Foundation Grants	675,295	-	944621	-	269326	-
Government Contributions	1,018,361	-	937968	-	-80393	-
Other Earned Income	0	-	0	-	0	-
Other Unearned Income	0	-	0	-	0	-
Interest & Dividend Income	2294	-	1200	-	-1094	-
Total Income	1,883,070	-	2067789	-	184719	-
Expenditures						
Personnel						
Salary CEO	688316	-	724534	-	36218	-
Salary Assistant		-		-		-
Payroll Taxes	88,118	-	113224	-	25106	-
Insurance - Workers' Comp		-		-		-
Insurance - Health	93586	-	92304	-	-1282	-
Payroll Services		-		-		-
Retirement	12405	-	12756	-	351	-
Total Personnel	882525	-	942818	-	60393	-
General Program/Administrative						
Bank/Investment Fee	1415	-	1100	-	-315	-
Publications	10891	-	10000	-	-891	-
Conferences & Meetings	11453	-	13000	-	1547	-
Mileage	106937	-	139000	-	32063	-
Audit & Accounting	20237	-	19000	-	-1237	-
Program Consultants	0	-	0	-	0	-
Insurance Expense	14709	-	12051	-	-2658	-
Telephone Expense - Land Lines	11623	-	11500	-	-123	-
DSL & Internet	46798	-	45000	-	-1798	-
Website	1860	-	2800	-	940	-
Office Supplies	41036	-	38000	-	-3036	-
Postage & Delivery	6464	-	8000	-	1536	-
Printing & Copying	19418	-	18000	-	-1418	-
Miscellaneous	709469	-	807520	-	98051	-
Total General Program/Administrative	1002310	-	1124971	-	122661	-
Total Expenditures	1884735	-	2067789	-	183054	-
Revenue Less Expense	-1665	-	0	-	1665	-

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22	528,012.	528,012.		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	118,384.	107,183.	11,201.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	531,147.	480,890.	50,257.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	10,159.	9,220.	939.	
9 Other employee benefits	72,265.	65,582.	6,683.	
10 Payroll taxes	66,188.	60,067.	6,121.	
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	18,000.	17,452.	548.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	30,341.	29,418.	923.	
12 Advertising and promotion				
13 Office expenses	86,095.	81,620.	4,475.	
14 Information technology	37,603.	36,459.	1,144.	
15 Royalties				
16 Occupancy	39,257.	37,753.	1,504.	
17 Travel	11,914.	9,441.	2,473.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	30,328.	30,328.		
23 Insurance	12,447.	11,756.	691.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a VOLUNTEER EXPENSES	178,034.	178,034.		
b EQUIPMENT RENTAL & REPAIRS	16,765.	15,896.	869.	
c POSTAGE & PRINTING	5,171.	4,416.	755.	
d DUES AND SUBSCRIPTIONS	2,510.	1,326.	1,184.	
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	1,794,620.	1,704,853.	89,767.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ if following SOP 98-2 (ASC 958-720)

Seniors in Service of Tampa Bay, Inc.	
2019 Operating Budget	
	Budget
Income	2019
Federal Contracts CNCS	937,968
Tampa City SCP CDBG	84,000
United Way Suncoast	37,071
Hills. County HS/EHS	47,056
Juvenile Welfare Board	281,588
Children's Board of Hills.	306,906
Grants and Foundations	188,000
Site Contributions	72,000
Contributions - General	18,000
Miscellaneous Income	100
Fundraising	55,000
Interest/Investments	1,200
In-Kind	39,000
Total Income	2,067,889
Total Salaries and Payroll Expenses	942,818
Program Expenses	
Dues	1,000
In Service/Comm. Space	1,200
Licenses	500
Printing/Newsletter	10,000
Marketing Program	10,000
Postage Program	5,000
Subscriptions	1,800
Supplies	35,000
Tech support	45,000
Mileage reimbursement	8,000
Staff Background checks	1,500
Travel-Long Distance	13,000
Subcontractors	46,900
Total Program Expenses	178,900
Occupancy Costs	
Building Maintenance	10,000
Corp Insurance	12,051
Janitorial	3,600
Lawn	2,500
Pest Control	1,500
Electric	7,000
Water/Trash	3,500
Total Occupancy Costs	40,151

Seniors in Service of Tampa Bay, Inc.	
2019 Operating Budget	
	Budget
Income	2019
Operating Expenses	
Audit	19,000
Bank Fees	1,100
Contractual	32,000
Copier	17,000
Postage Administration	3,000
Printing (outside)	1,000
Telecommunications	11,500
Total Op. Expenses	84,600
Other Expenses	
Board of Directors	4,800
Staff Other	5,000
Staff Training	7,500
Supplies Admin	3,000
Total Other Expenses	20,300
Fundraising Expenses	
Development	4,000
Fundraising	10,000
Total Fundraising Exp.	14,000
Volunteer Expenses	
Stipends	520,120
Travel	131,000
Meals	28,500
Vol Background Checks	5,000
Volunteer Training	3,500
Team Leaders SCP	3,000
Vol Insurance	2,500
Recognition	25,000
Physical Exams	500
Uniforms	2,000
Total Vol. Expenses	721,120
Depreciation	31,000
In-Kind	35,000
Total Expenses	2,067,889
Revenue	2,067,889
Net	0

S.L. Gimbel Foundation Fund

*** 1. Name of your organization.**

Seniors in Service of Tampa Bay, Inc

*** 2. Grant #**

20180518

*** 3. Grant Period**

8/15/18 – 8/15/19

*** 4. Location of your organization**

City Tampa

State FL

*** 5. Name and Title of person completing evaluation.**

Donna Killoren, Director of Community Outreach

*** 6. Phone Number: 813-760-7636**

*** 7. Email address** dkilloren@seniorsinservice.org

Key Outcomes and Results

*** 8. Total number of clients served through this grant funding: 324**

*** 9. Describe the project's key outcomes and results based on the goals and objectives.**

Goal: Each year, insure on-time grade promotion for all Hillsborough County Title 1 K-3rd students by providing the 3 key pillars of success – caring, trained, consistent mentor/tutors; family engagement; and relevant, engaging curriculum.

Objective 1: Ensure on-time grade promotion for at least 403 Kindergarteners and 1st graders at Oak Grove and Mendenhall Elementary schools at the end of the 2018/2019 school year by providing Family Fun Nights through Zoo Tampa at Lowry Park, and engaging the entire family in natural-science curriculum in the classroom, at Family Fun Nights and at home.

Activities, Results and Outcomes for Objective 1:

The Expected Outcome was that at least 403 underserved Kindergarteners and 1st graders at Oak Grove and Mendenhall Elementary schools will achieve on-time grade promotion by the end of the 2018/2019 school year. Due to lower school enrollments than originally anticipated, we served 324 children instead of the 403 previously specified in our proposal.

Reports from the Hillsborough County School District with “on-time grade promotion” data have been delayed. We have received a preview of this data for 49% (159/324) of the children we served, as some of the teachers provided “on-time grade promotion” as part of their Child Care Plan Evaluations. All 159 (100% of the children whose data we received) achieved on-time grade promotion by the end of the 2018/2019 school year.

Activities to achieve this outcome were:

Volunteer Engagement: Program staff recruited, screened, trained, engaged, recognized, retained 20 Foster Grandparent Mentor/Tutors aged 55+ to serve at Oak Grove or Mendenhall Elementary.

Individualized Child Care Plan Creation: 19 classroom teachers created individual Child Care Plans to assess individual student needs and to guide volunteer tutoring in literacy and social/emotional skills for 324 students in K and 1st grade.

One-on-one or small-group in-class tutoring/mentoring: 324 underserved Kindergarteners and 1st graders were tutored/mentored by 20 classroom Foster Grandparent Mentor/Tutors. This included:

- students reading aloud to help with pronunciation and word identification
- listening to Foster Grandparent Mentor/Tutor read aloud and following up with questions for comprehension.
- tutoring alphabet, math, numbers table skills - the fundamental skills to be promoted to the next grade
- using sight word flashcards/playing games to develop knowledge of letters, sounds, and words
- teaching social skills, respect for others, positive experiences with adults
- developing trust and stability through consistent encouragement from the same caring volunteer who served daily in the classroom
- offering wisdom, devoted time, and love to children who otherwise might not receive heartfelt concern.

Parents Invited for Readers in Motion Membership: Invitations to join Readers in Motion were sent to parents/caregivers of 324 students. Children whose parents joined received a members-only backpack.

Zoo-to-You Classroom Animal Encounters: We held Zoo-to-You Classroom Events for 324 students (2 events per grade (K and 1st grade) per school). Animal experts brought live animals that corresponded to enhanced class curriculum. In January 2019, Zoo Tampa staff brought a tree frog, python, skink and armadillo for up-close animal presentations. The students were able to see the animals as close as they felt comfortable and ask questions directly to animal professionals. At Zoo-to-You, the children geared up for Readers in Motion’s next set of Family Fun events hosted at Zoo Tampa in February.

Outreach to parents/caregivers: Invitations were sent to parents/caregivers of 324 children in K and 1st grade to attend special events. In addition, program staff personally called 5-10 parents per week to encourage them to participate in “Ed-Zoo-Cation” Family Fun events and/or get their feedback/suggestions for program improvement.

Parent Engagement “Ed-Zoo-Cation” Family Fun Events: We organized 3 sets of events held on Saturday mornings when parents were more likely/able to attend. These were structured events including at least 2 activities plus breakfast. We held 9 Family Fun Events total, with 3 per grade (K and 1st grade) for Oak Grove Elementary and 3 total for Mendenhall Elementary (where K and 1st grade were combined). 324 students were invited to attend with their entire families — parents, grandparents and siblings were all invited to attend. Family Fun Events engaged attendees in natural science-based curriculum tied to classroom work and Reading Challenges to complete at home. All activities engaged the whole family and included the children’s classroom teachers and the Foster Grandparent Volunteer Tutors, building a bridge between the educational team and the student’s home life. Below is a description of each of the 3 sets of events:

1. November 2018 – The theme was “What Do Animals Eat?”. Attendees rotated among 3 stations:
 - Animal Poop Craft- The main way we determine whether an animal is sick is by examining its poop (gross!). Zoo experts test poop weekly to make sure the animals are healthy. In this craft, kids and parents made a “poop craft” using modeling clay, twigs, seeds, acorns, leaves and other items found in nature. They learned that the consistency changes depending on what the animals eat.
 - Outdoor Games (Killer Frog, Don’t Wake the Bear and Predator vs. Prey) Each game was designed for the kids to learn the roles of animals (specifically how they get their food) in nature through activity.
 - Zoo Animal Diets- Herbivores, carnivores and omnivores each have different kinds of teeth. Animal skulls were set up in classroom for show and zoo experts explained the difference in the three, allowing the kids to guess which animal (skull) belongs to which group. They shared “fun facts” of one-horned rhinos, pygmy hippos, African Elephants, Florida Panthers, African Painted Dogs, orangutans and black bears and had picture cut-outs that students organized into the correct group.
2. February 2019 – The theme was Animal Classification. The events started with mingling in the lecture hall and featured a Book Table for children to choose a book, from a selection laid out by grade level, to take home and read with their family. Zoo experts then led our groups on private tours through the Asian Gardens and Florida Wildlife areas, pointing out the various animals and how they are classified in the animal kingdom. Parents and children alike participated in an animal classification activity during the tour where they dove even further into the topic.
3. April/May 2019 – These are our end-of-year Sunset Safari Graduation celebrations. Held on Saturdays, they started with mingling and breakfast in the lecture hall to make it stress-free for the families attending. We featured a book table, manned by wonderful Foster Grandparent Volunteer Tutors, where each child was able to select one book to take home. Parents enjoyed the chance to engage one-on-one with the volunteers who tutored their children in class each day. Afterwards, the children were recognized in our “graduation ceremony” where they were called up individually

to stand with their class and received personalized certificates. Teachers and Foster Grandparent Tutors posed for class pictures, and parents bonded over the funny faces and sharing photos. The families were then invited to enjoy a zoo day together.

Monthly Reading Activity Worksheets: 324 students received Monthly Reading “Bingo Book” Activity Worksheets and were challenged to complete 16 reading activities at home with their parent/caregiver per month. Each book featured 4 pages (one for each week of the month) and 25 reading activities laid out like a bingo board. The activities were created to encourage students to read with their family members. Some examples include: Ask mom/dad to read you a book they love; Read under a blanket with a flashlight; Read a book twice in a row; and Read after dinner. Parents were asked to sign off on activities they completed with their child. Each student that completed at least 16 reading activities for the month earned a brand-new book to take home. All families had access to books through myON, the digital reading environment made available by Hillsborough County School District to residents of Hillsborough County.

Compliance activities: Program staff participated in monthly school visits and monthly monitoring of volunteer service. Program staff monitored student progress quarterly.

Year End Child Care Plan Evaluations: 19 classroom teachers evaluated student improvement vs. initial assessment of literacy and social/emotional skills for 324 students.

*** 10. Please describe any challenges/obstacles the organization encountered (if any) in attaining goals & objectives.**

We know that parent engagement is critical to helping underserved elementary school children succeed. Increasing parent engagement continues to be a challenge, as low-income parents are often too busy, stressed or intimidated to engage with the child's school and educational process.

*** 11. How did you overcome and/or address the challenges and obstacles?**

We made it our mission to connect with the parents in a deeper and more meaningful way. In our efforts to continue to improve Readers in Motion, we wanted to give parents the opportunity to think critically and offer constructive criticism. We created Parent Advisory Groups to gauge how best to communicate with the parents and what kinds of activities they are most interested in participating in with their children. We received feedback from 52 parents/guardians and here's what we learned:

1. Their preferred method of communication is either phone calls or text messages. Readers in Motion program staff increased outreach by calling 5-10 parents/guardians per week to discuss the program and creative ways to get involved with their student's education.
2. They would like more zoo activities, more animal interaction and more locations/variety of family events. We will take this feedback into account for future events.

*** 12. Describe any unintended positive outcomes as a result of the efforts supported by this grant.**

Our “End of Year Reading Challenge” spanning from February-April of 2019 inspired a 36% increase in average number of students reading outside of school each month and a 56% increase in the average reading frequency done outside of school!

*** 13. Briefly describe the impact this grant has had on the organization and community served.**

This grant enabled Seniors in Service to replicate our proven award-winning Readers in Motion initiative in another Title I school in Tampa, increasing the community impact to help a total of 324 underserved children in Kindergarten and 1st grade succeed.

Readers in Motion provides intensive literacy and social behavior intervention by caring, trained mentor/tutor volunteers aged 55+. Student engagement is sparked through relevant and age-appropriate content from the natural sciences. Parents are included in the process through regular communications and engaging events, inspiring involvement in their child's education that's essential to academic success.

Budget

Provide detailed information on how funds were expended. Copies of receipts or additional information can be emailed to grant-info@thecommunityfoundation.net.

14. Please provide a budget expenditure report. Also, provide a budget narrative that explains how the funds were utilized, what was purchased, what were the expensed items based upon the budget that was submitted.

2018 S.L. Gimbel Foundation Budget Expenditure Report

Line Item Description	Line Item Description	Requested Amount From TCF	Spent Amount From TCF
1a) Salaries	Program Staff: Senior Program Manager, Program Coordinators, Program Assistant	\$ 15,350	\$ 15,350
1b) Payroll Taxes & Benefits	FICA, State Re-employment tax, Health Insurance	\$ 4,650	\$ 4,650
Total Salaries and Benefits		\$ 20,000	\$ 20,000
2. Program Expenses	Staff mileage for travel to the school sites, Zoo, and Children's Board trainings. Family Engagement Events with STEM activities, meals. Zoo to You classroom visits Learning materials – backpacks filled with learning supplies	\$ 5,000	\$ 5,000
TOTALS:		\$ 25,000	\$ 25,000

Success Stories

Please use the following spaces to provide any client stories, anecdotes, or quotes to showcase the success and impact you were able to achieve due to this funding.

* 15. Please relate a success story:

Readers in Motion collected feedback from parent surveys taken at the Zoo Tampa events; by engaging with parents through regular phone calls; and through unsolicited parent emails. The feedback collected was very positive!

Email from parent Sara W.: "I wanted to thank you for sponsoring the class and helping children excel at a young age. I've tutored children for years and I know how important it is to establish a strong foundation as early as possible. I think your program is absolutely wonderful and we've enjoyed participating in it. Elani loves her tablet, and the books she's received from your organization. Your contests motivated her to read even more, and helped her to advance significantly over the course of this year. If there is any way that we can help, volunteer, etc., please let me know!"

Email from parent Maryam H.: "I appreciate ALL you have done with this reading program. We LOVED it!! Matthew and I REALLY enjoyed doing it TOGETHER, and it obviously increased his love for books and reading!!!!...PLEASE let me know if I can volunteer or help out in ANY way this summer. Seriously, I will be off, and would LOVE to help, if the need is there."

Parent Survey #1: "The event at the zoo has been a lot of fun for the kids so far. I think the Readers in Motion program has been a valuable tool to help my daughter learn to read."

Parent Survey #2: "She is REALLY READING!"

Parent Survey #3: "Encuentro que el programa es muy útil para que los niños sigan desarrollando el aprendizaje." (Translation: I find that the program is very useful for the kids to continue developing and learning).

16. Please relate a success story here:

Seniors in Service was recognized by our federal funder for our Readers in Motion initiative that enhances the national-affiliated Senior Corps Foster Grandparent Program. In June 2019, our staff was invited to present "Innovations to Empower Children's/Family Literacy" at the annual convening of Senior Corps grantees in Denver, CO. We shared lessons learned through our Readers in Motion initiative about helping underserved children succeed by augmenting intensive, ongoing tutoring/mentoring from caring volunteers with enhancements that include enriched curriculum, increased parent engagement, and increased reading frequency.

17. Please relate a success story here:

Our successful Readers in Motion initiative was recognized by myON – our program partner that provides the digital reading environment used for our reading challenges. In April 2019, we were

honored when myON sent representatives to visit Oak Grove Elementary, one of our Readers in Motion schools, to film a segment that will become part of their national campaign!

And we received kudos from Florida Senator Rick Scott on May 6, 2019, when he visited Seniors in Service and Mendenhall Elementary in celebration of Older Americans Month. He was impressed to learn about our Readers in Motion initiative, tweeting: "It's a great program that helps students and senior-aged volunteer tutors alike!"

Organizational Information

18. Which category best describes the organization. Please choose only one.

Service Organization

19. What is the organization's primary program area of interest?

Health & Human Services

20. Percentage of clients served through grant in each ethnic group category. Total must equal 100%

African American 11%

Asian/Pacific Islander 1%

Caucasian 12%

Native American

Hispanic Latino 71%

All Ethnicities

Other 5%

Unknown

21. Approximate percentage of clients served from grant funds in each age category.

Children Birth-05 years of age

Children ages 06-12 years of age 100%

Youth ages 13-18

Young Adults (18-24)

Adults

Senior Citizens

22. Approximate percentage of clients served with disabilities from grant funds.

No clients served with disabilities 100

Physically Disabled

Blind & Vision Impaired

Deaf & Hearing Impaired

Mentally/Emotionally Disabled
Learning Disabled
Speech Impaired
Other Disability

23. Approximate percentage of clients served in each economic group.

At/Below Poverty Level 90%
Homeless/Indigent
Migrant Worker
Working Poor
Other

24. Approximate percentage of clients served from grant funds in each population category.

Single Adults
Families
Single Parent Families
Disabled
Ethnic Minority
LGBTG
Abused Women/Children
Homeless/Indigent
Immigrants
Military
Parolees
Students 100
Elderly
Children/Youth (those not included in Family)

Internal Revenue Service

Department of the Treasury

District Delaware-Maryland District
Director

31 Hopkins Plaza, Baltimore, MD 21201

P.O. Box 13163, Room 817
Baltimore, MD 21203

SEPTEMBER 1, 1998

Employer Identification Number:
59-2422975

SENIORS IN SERVICE OF
TAMPA BAY, INC.
1306 W SLIGH AVENUE
TAMPA, FL 33604

Person to Contact:
EP/EO Tax Examiner

Telephone Number:
(410) 962-6058

Dear Sir/Madam:

This is in response to your inquiry dated AUGUST 27, 1998, requesting a copy of the letter which granted tax exempt status to the above named organization.

Our records show that the organization was granted exemption from Federal Income Tax under section 501(c)(3) of the Internal Revenue Code effective AUGUST, 1984.

We have also determined that the organization is not a private foundation because it is described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you under section 170 of the Code.

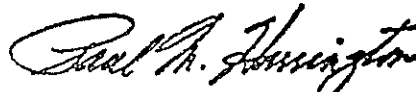
As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during the calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

You are required to file Form 990, Return of Organization Exempt from Income Tax, only if your gross receipts each year are normally more than \$25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return.

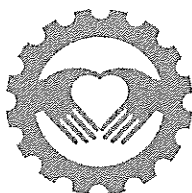
A copy of our letter certifying the status of the organization is not available, however, this letter may be used to verify your tax-exempt status.

Because this letter could help resolve any questions about your exempt status, it should be kept in your permanent records.

Sincerely yours,



Paul M. Harrington
District Director



SENIORS in SERVICE

GEARED UP TO SERVE

2019 Board of Directors

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Fundraising Committee