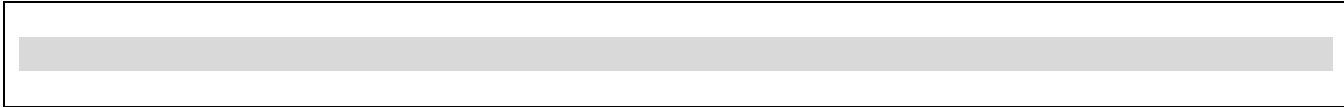




# AGENCY/PROGRAM APPLICATION FOR FUNDING

## Fiscal Year 2022-2023

NAME OF AGENCY			
Our Place of New Trier Township			
CONTACT PERSON AND TITLE			
Judi Nealey, Executive Director			
ADDRESS			
370 Chestnut			
CITY		STATE	ZIP
Winnetka		IL	60093
PHONE		FAX	
847-512-4661			
E-MAIL			
jnealey@ourplaceofnewtrier.org			
WEB			
www.ourplaceofnewtrier.org			
NO. OF YEARS IN EXISTENCE		TOTAL AGENCY FUNDING REQUEST FOR PROPOSED YEAR	
13.5		\$ 135,000	
PROGRAMS REQUESTING FUNDING	AMOUNT RECEIVED LAST YEAR	\$ AMOUNT FOR PROPOSED YEAR	FUNDED BY TOWNSHIP SINCE? (Estimate of Year OK)
1. General Programs	\$130,000	\$ 135,000	2009
2. _____	\$ _____	\$ _____	_____
3. _____	\$ _____	\$ _____	_____
4. _____	\$ _____	\$ _____	_____





# AGENCY/PROGRAM APPLICATION FOR FUNDING

## Fiscal Year 2022-2023

### Eligibility Criteria For Funding

New Trier Township General Statement of Policy:

- **Each agency/program requesting funding from the Township will be referred to either the Agency Oversight Committee, the Mental Health Committee, or the Money Follows the Person Committee of the Township. Those committees will make funding and agency/program recommendations to the New Trier Township Board of Trustees. You will be notified of their final decisions sometime in the spring.**
- Agencies considered for funding should have been in existence for one year after receiving their not-for profit status from the State of Illinois and have been providing services to the community during that time.
- No agency with the ability to tax or conduct referendums will receive Township funding.

In order to be eligible for funding an agency must meet the following minimum requirements:

- **Area Served** - While an agency may serve areas other than New Trier Township, its programs must serve residents of New Trier Township.
- **Proportion of Township Residents Served**- For agencies serving more than New Trier Township, the amount of funding requested shall take into consideration the proportion of the agency's service rendered to residents of New Trier Township.
- **Non-Profit** - Funded agencies must be 501 (c) (3) not-for-profits.
- **Needs**- The need for the service must be demonstrated.
- **Standards** - An agency requesting funding must have at least one full-time paid staff person, or its equivalent; the credentials of the applicant's staff shall meet professional standards, commensurate with the responsibilities involved.
- **Employment Practices** - The agency must be an equal opportunity employer.
- **Articles of Incorporation** - Submit a copy, as amended, if changed in the last 12 months.
- **Bylaws** - Submit a copy, as amended, if changed in the last 12 months.
- **Use of Funds** - Funds must be used as specified in the grant application and as approved by the Township. Changes must be cleared with the Township.
- **Accessibility** - *All services must be available to clients with disabilities and the agency*



## AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

*must be able to deliver services from a site that is ADA accessible. If not, please explain.*

- **Accountability** - The agency shall maintain communication with the assigned advisory committee liaison, who must be allowed to attend board meetings upon request. The agency may dismiss the person from a board meeting if they convene into Executive Session. The agency shall provide meeting minutes to the liaison upon request
- **Financial** - *All agencies with budgets of greater than \$300,000 must have an annual audit performed by an independent CPA. Those agencies with a budget of \$300,000 or less must submit to the Township a copy of form AG990 that is sent to the Attorney General's Office. The Township reserves the right to request an audit be performed for agencies with budgets of \$300,000 or less.*
- **Absence of Conflicts of Interest** – The agency certifies, to the best of its knowledge, information, and belief, that it has no current relationship or involvement with any New Trier Township Trustee, Employee, or Committee Member which the Agency reasonably believes could either favorably or unfavorably influence the Township's possible grant of the Agency's funding request.

YES  \_\_\_\_\_

NO \_\_\_\_\_ - If no, please explain.



# AGENCY/PROGRAM APPLICATION FOR FUNDING

## Fiscal Year 2022-2023

### Other Certification Issues

Please mark yes, no, or other as appropriate next to each statement. If no, or other, please explain. Supporting documents may be requested at a future date and must be supplied upon request.

YES NO OTHER (PLEASE EXPLAIN)

- |                                     |                          |                          |   |
|-------------------------------------|--------------------------|--------------------------|---|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency maintains a personnel policy manual  |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a non-discrimination policy  |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a sexual harassment policy   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a grievance procedure  |
| <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a Strategic Plan<br>Covers years <u>2021 - 2024</u>  |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency produces an Annual Report<br>Most recent report covers period <u>January – December 2020</u>   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency has an effective fiscal management system in place and has disclosed any and all Conflicts of Interest as described in the Eligibility Criteria for Funding.   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Audit or AG990 completed and copy provided to the Township for most recent fiscal year  |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency maintains general liability insurance coverage and names New Trier Township as additional insurer<br>Amount of coverage <u>\$3,000,000 umbrella, \$1,000,000 liability</u><br>Name of insurer <u>West Bend</u><br>Effective dates of coverage <u>February 2021 – February 2022</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency pays all state and federal payroll taxes   |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Agency has a conflict of interest policy.   |



# AGENCY/PROGRAM APPLICATION FOR FUNDING

## Fiscal Year 2022-2023

YES	NO	OTHER	(PLEASE EXPLAIN)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agency has by-laws in place Date last amended/accepted <u>June 2019</u>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Agency is accredited by recognized accreditation organization (where appropriate) Date of most recent accreditation _____ Accreditation Organization _____
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agency's board serves without compensation Number of board members <u>10</u> Number of Board vacancies <u>2 - 5</u> List board sub-committees <u>Finance, Development, Program, Human Resources, Executive, Governance</u> Schedule of board meetings <u>Monthly, 3<sup>rd</sup> Wednesday</u>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Agency has Auxiliary or other Advisory/Governing Board. If so, please explain: _____
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agency provides staff with opportunities for training and personal development
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agency has filed its annual report with the Illinois Attorney General # <u>May 2021</u>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Agency has filed its annual report with the Illinois Secretary of State # <u>March 2021</u> Federal Tax ID # <u>11-3838696</u>

*We certify that we meet all the eligibility criteria for funding and that the information contained in this application is true and correct to the best of our knowledge and agree to comply with all requirements of the program and funder if we are awarded and accept funding. Furthermore, our Board has been advised of the Eligibility Criteria and approved our signing of this document.*

Agency Director Name Judi Nealey

Signature \_\_\_\_\_

Date: \_\_\_\_\_

Board President Name Jane Gallery

Signature \_\_\_\_\_

Date: \_\_\_\_\_



# AGENCY/PROGRAM APPLICATION FOR FUNDING

## Fiscal Year 2022-2023

### Organizational Profile

(A) The Organizational Profile is part of the New Trier Township Application For Funding; and (B) It is the Agency's responsibility to keep the Organizational Profile information current each year and provide New Trier Township with further information on an ongoing basis if there are any significant changes, such as to the mission, organization, board requirements, and/or other changes.

(1) Briefly summarize the agency's mission, history, services, and organizational structure. Have these changed significantly over the lifespan of the organization? (Please attach a current organizational chart, if available.)

**Mission:** Our Place started with a simple vision: individuals with developmental disabilities should be able to remain in their home community into adulthood, living lives of meaning and purpose. Our mission is to provide supports so that they can attain this vision and build meaningful, productive, socially connected lives here in our community.

**History:** In 2008 a group of parents and community members in the north Chicago suburbs came together to realize this vision. Together, and with a start-up grant from New Trier Township, they created Our Place with the objective to ensure that participants develop the skills and gain the experiences they need to live independently, as fully engaged citizens.

We grew quickly and currently serve close to 90 individuals, with an annual budget of around \$1 million. In our short history, we have created a solid program that meets the needs of each of our participants while engaging with and strengthening our community.

**Services:** Our Place seeks to improve outcomes for individuals with disabilities - educationally, socially, vocationally, and as engaged members of their community. We continually design and implement innovative programs using best-in-class initiatives, focusing on the development of social skills and meaningful relationships. Our programs are integrated within the community, where participants volunteer, learn, make connections, and build life skills. We serve teens starting at the age of 16 so that their transition to adulthood is seamless when they graduate at age 22. Participants don't age out of Our Place and many of our original participants are still actively involved well into their thirties.

**Organizational Structure:** The Executive Director is responsible for the day-to-day operations of the organization, with oversight by the Board of Directors. The Program Director and Finance and Administration Director handle the primary functions of the agency, and report to the Executive Director. Our Place employs 12 professional staff members, 9 of whom deliver programs.



## **AGENCY/PROGRAM APPLICATION FOR FUNDING**

### **Fiscal Year 2022-2023**

- (2) Briefly summarize the role of the board and the requirements for serving on it. What role does the board play in the administration and operation of your organization and what is the desired size of a full and active board?

The Board of Directors is responsible for determining the mission, vision, and values of the agency and ensuring that management delivers programs to attain these goals. It does this by developing a strategic plan; establishing policies and objectives; hiring and evaluating the executive director; acquiring sufficient resources for operations; and accounting to the public, including funding agencies, the government, families, participants, donors, and the community.

We maintain comprehensive insurance to cover liability, directors and officers, cyber-security, continuation of operations, and umbrella coverage. All Board members are actively engaged in fundraising and relationship building. All Board members donate personally and bring in funds from other individuals, corporations, and philanthropic organizations.

Requirements for serving on the board include a commitment to providing excellent services for teens and adults with developmental disabilities; managerial, professional and/or organizational skills; and involvement in the community.

We envision a full and active board will have 12 - 15 members. We currently have 10 Board members and are developing new candidates by having them serve on committees. Seven board members have a family member in programs.

## **Agency/Program Funding Request Information**

### **PROGRAM DESCRIPTION**

- (1) Describe the services provided by this program, eligibility requirements, and the target population.

#### **Services**

We are requesting funds for our general program where we focus on skills development and immersion in community life. We operate in the center of Wilmette with in-person programs on weekdays from 9:30 till 5:00 and Saturday evenings. We also offer online programs six days a week.

We help participants develop meaningful relationships with peers, staff, mentors, and community volunteers; we have found this to be the most effective way to help them attain their personal objectives. Participants choose from close to 40 distinct programs to meet their personal goals and interests with multiple activities in the areas of literacy, arts, vocational training, healthy living, life skills, recreation, service, interactive games, and socials.

Close to 50% of activities are offered in the community, alongside local residents. We exercise and play team sports at park district fitness centers, hold book discussions at local libraries, eat lunch at local restaurants, and provide service in community nonprofit agencies.



## AGENCY/PROGRAM APPLICATION FOR FUNDING

### Fiscal Year 2022-2023

Community volunteers are an integral part of our mission and a key to the success of our program. Retired business people provide motivation and individualized attention to participants in programs. Community members act as job coaches in our vocational training program at the Township Food Pantry. High school and college students act as peer mentors, providing friendship and social skills modeling for participants.

#### Eligibility Requirements

The eligibility requirements are that participants have intellectual and developmental disabilities, are at least 16 years old, and seek to participate in programs that focus on social engagement and community integration.

#### Target Population

The target population is individuals with intellectual and developmental disabilities who have completed educational programs at the end of the school year in which they turned 22, and young adults age 16 and older.

- (2) How does this program fit in with one or more of the priorities identified by New Trier Township in its strategic plan? Please explain.

Our program directly addresses the wide-ranging needs of persons with intellectual and developmental disabilities by providing direct services in our community. We follow the principles of person-centered planning and community integration. In addition, we fit with other main priorities of the Township's strategic plan:

- We assist seniors through our volunteer service at retirement communities.
- We provide young adults in our community valuable service opportunities through peer mentoring.
- Our work at the Township Food Pantry and holiday programs benefits low-income families.
- Our collaboration with Our House Communities supports individuals and families seeking innovative residential options in the Township so that they can age in place rather than move to institutions.

Please check each priority you feel the program addresses. (Most programs will address only one or two priorities.)

See our website at [www.newtriertownship.com](http://www.newtriertownship.com) for more information.

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Aging in Place | <input checked="" type="checkbox"/> Low Income Families       |
| <input checked="" type="checkbox"/> Youth Services | <input checked="" type="checkbox"/> Persons with Disabilities |
| <input type="checkbox"/> Other _____               |   |





## AGENCY/PROGRAM APPLICATION FOR FUNDING

### Fiscal Year 2022-2023

#### NEED

- (3) Describe the need and demand for this program in the community and justify that it deserves investment of Township funding. You may include both data and examples of individual clients.

Schools in our community provide excellent services for persons with developmental disabilities through the age of 22, with education, vocational training, and opportunities for personal growth. But, when these residents graduate, the programs that invested in their futures come to an end. Jobs are hard to come by and even harder to sustain. Social programs to help them engage socially are limited, and most offer little flexibility to accommodate personal interests and needs. Many individuals cannot join general community programs because they do not have the required social skills. Transportation is a major problem as most of these individuals do not drive, many cannot navigate public transportation, and the door-to-door PACE bus is difficult to predict.

That is why we created Our Place in 2008 - to ensure that adults with developmental disabilities can continue building meaningful lives in our home community. But the number of adults needing services continues to increase at the same time that government support plummets in Illinois. Programs reliant on state funding have become less flexible in accommodating individual needs and less able to hire highly qualified professional staff. Families struggle to pay for services, especially when their sons or daughters need individualized supports. Adults who have part-time jobs often cannot join in social programs because of conflicting hours.

We address these challenges by offering a variety of schedule and activity options, meeting the needs of individuals, and keeping our fees relatively low. And we offer fee waivers for families who need financial support. We work with families and participants to set meaningful goals and we support the attainment of those goals with individualized plans, meaningful programs, and strong community engagement.

To deliver these services and continue improving lives for adults with developmental disabilities in our community, we need to raise approximately half of our budgeted revenues, or over \$500,000 every year. In addition, we need to fund the Fee Waivers that some of our families rely on.

We continue to provide opportunities for staff to develop specialized skills so that they can support participants who need more individualized attention. We are also focused on developing programs and activities to address the changing interests of participants as they age, including supports as they move into residences in the community.

We believe that Our Place justifies the ongoing support of the Township because of the services we provide to residents with developmental disabilities and the contribution we make to the well-being of their families and the general community. New Trier Township is stronger because Our Place is here.

- (4) Are you able to meet the full demand for this service or is there a waiting list? What new or unmet needs do you see in the community or for the clients served in this program?

Currently we can meet the demand for our services through both onsite and online programs. We do not have a waiting list. Interest in joining Our Place continues strong and we move applicants quickly through the intake process.



## AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

### CAPACITY

- (5) Demonstrate that the program has the vision, personnel, and skills to successfully carry out the program and achieve its goals, objectives and performance measures. Summarize any major changes in staff or personnel.

Our Place has proven its sustainability through a vision that resonates with families and solid leadership. We have maintained balanced budgets, operating reserves, community support, and steady enrollment over 13 years. Management conducts solid financial planning and budgeting, with verification through ongoing Board review and professional audits. Our Place is committed to operating as a private agency so that we can avoid the uncertainties associated with reliance on state or federal funding and the related restrictions on program offerings.

Four key principles guide our financial planning to ensure sustainability:

1. Keep program fees low so that families can afford our services: we budget so that fees are 50 – 60% of revenues and raise funds to cover the difference.
2. Build a broad base of funding sources, including individuals, events, grants, and corporations. We have over 600 donors. All Board members donate and close to 90% of families donate.
3. Maintain reserves of 3-8 months of operating expenses to ensure program continuity if fundraising or fee revenues do not meet projections and to cover unanticipated expenses. We currently have seven months of reserves.
4. Keep administrative and fundraising expenses below 20% of total expenses. Currently these expenses are 15%.

We have a strong management team in place and an experienced professional program staff. Despite a tight employment market, we have been able to attract five new exceptional managers and employees in the past several months.

In early May of this year Judi Nealey joined us as Executive Director. During the prior 10 years, Judi served in several leadership positions at Campanelli YMCA in Schaumburg, moving up through development and marketing to become the Executive Director, a position she held for over six years. She has a passion for people with intellectual and developmental disabilities, strong management skills, especially in working with a top-notch professional staff, and solid development experience. Judi finds our mission and programs inspiring, sees great potential in our building, and is looking forward to heading up a capital campaign. She has already made her mark in all of these areas.

Two long-term managers who turned 65 retired after long careers and we hired even stronger professionals to replace them. Meagan Dunn is our new Program Director, bringing over 20 years of experience with North Suburban Special Education District. Meagan has done direct service with special education students, focused on behavior issues. She has built professional teams, collaborated on best practices to help individuals attain their goals, worked with parents and professionals to create person-centered plans, and ensured programs are effective.



# AGENCY/PROGRAM APPLICATION FOR FUNDING

## Fiscal Year 2022-2023

Megan Zegler is our new Finance and Administration Director and brings over 20 years of finance and accounting experience, including ten years in the nonprofit sector. Her accounting experience and attention to detail will provide the supports we need for expansion and a Capital Campaign.

Because we were able to fully re-open in-person this summer, ahead of projections, we also recruited two experienced Program Leaders who have already made an impact with their energy, professionalism, and commitment to our participants.

We have never been more optimistic about our future.

### SERVICE STATISTICS/DEMOGRAPHICS

(6) Who is being served by this program? Please provide a statistical breakdown of the number of clients served, the total units of service delivered, and costs per unit of service by filling in the chart below. Please state and define your unit of service for this program and why you chose it. To calculate cost per unit of service, divide the total number of units of service into the total budget for the program. (Suggestions for the appropriate unit of service are included in the proposal in the directions. For some programs you may wish to calculate cost per unit of service in more than one manner.)

(6a) Unit of service definition – one hour of program service for one participant

(6b) SERVICE STATISTICS – Please indicate fiscal year dates for each column

PLEASE INDICATE FISCAL YEAR/DATES IN EACH COLUMN	Prior Year 2020	Present Year 2021	Proposed Year 2022
Number of persons served (unduplicated count)	84	87	95
Number of units of service	30,769	44,000	50,000
Cost per unit of service	\$33.91	\$22.87	\$23.02

(7) What are the demographics of New Trier clients served in the prior year? (breakdown by community).

Glencoe – 5; Glenview in the Township – 1; Kenilworth – 3; Wilmette – 22; Winnetka - 11



## AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

(8) Total from New Trier Township (unduplicated).

42

(9) New Trier Township clients are what % of total?

50%

(10) Units of Service to New Trier clients.

13,742

(11) Units of Service to NTT clients are what % of total

45%

(12) New Trier clients age breakdown

Under 22 years old – 7

Over 22 years old - 77

### OUTCOMES/EVALUATION

(13) What outcomes did you achieve for your clients in the prior year? Results should be client-outcome based, specify a target level of achievement, the measurement tool that was used, the rationale for setting the target at a certain level, and a timeframe for accomplishment. Detail any

We use two evaluation systems to assess improvement for our participants and to measure the effectiveness of our programs:

- Individual and Program Outcome Targets: We expect annual personal growth for every participant and consolidate individual results to assess the effectiveness of our programs.
- Family and Participant Satisfaction Surveys: Two major indicators that the program is attaining its goals are family satisfaction levels and ability of participants to demonstrate improved social competencies when they are not at Our Place. We normally survey only the families but this year also surveyed participants.



## AGENCY/PROGRAM APPLICATION FOR FUNDING

### Fiscal Year 2022-2023

#### Individual and Program Outcomes:

We assess progress for individuals by taking a benchmark measurement at the beginning of a session, tracking performance throughout the session, and then evaluating progress at the end of the session. Sessions run from 11 to 16 weeks. Achievement is measured using individualized indicators so that participants are continually challenged to attain higher level skills. Staff collects the data and collaborates on a daily basis to make adjustments.

We target some level of improvement for every individual, and plan for measureable improvement for at least 80% of participants. Over the past year, we saw noticeable improvement among 90 – 100% of participants, both in online and in-person programs.

Some examples of individualized improvements and program effectiveness include:

- In swimming, we set a goal that every participant would improve in the areas of swimming ability, focus in following directions, and team spirit. At the beginning of the session, five of the ten participants were not able to do the simple drills or swim even a short distance in the relays. By the end of the session, all ten were able to follow the drills, swim in the relays, and focus during the team reflections and final meditation. The proficient swimmers had all improved their strength and stamina as swimmers and were doing longer relays. We plan to carry this model into our winter swim program.
- In Our Place Press, the participant written newsletter, at the beginning of the session participants tended to always write about the same topic, produce short articles, and offer only brief comments in the group discussion. By the end of the session, their articles were longer, covered more varied topics, and all members of the group shared in the group discussion. The conversations became livelier and more inclusive. We will improve the program going forward by increasing time in the group discussion to help participants grow in trying new topics and developing their articles to be longer.
- In Kitchen Kinetics we started with simple food assembly activities with pre-cut fruits and vegetables. The need for social distancing prevented close supervision so we could not support participants in cutting and other food prep skills. As the session progressed, social distancing and staff assistance limitations relaxed so we could add more complex activities, like using knives, mixing ingredients, using equipment like blenders. By the end of the session, even participants with fine motor limitations could safely use a knife, operate equipment, and assist in clean up. In the next session we will add more complex recipes so participants can prepare simple snacks and lunches independently. And we have added a Culinary Skills program to build upon these basic accomplishments.
- In online programs we saw participants improve their ability to follow directions in fitness programs, learn multi-step dance patterns, and follow instructions for writing and art projects. They also all improved in communicating through Zoom, sharing in conversations, and supporting their friends. Most became independently able to sign in and manage Zoom programs.



## AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

### Satisfaction Surveys:

We increased the frequency of surveys to three times over the past 17 months to help us plan the return to in-person programs and to adjust online programs to meet the needs of participants. The Family Satisfaction Survey covers a broad range of issues including evaluations of individual achievement, specific program interest, evaluations of staff effectiveness, and ranking of importance for various aspects of our programs. We aim for 90% ratings in overall satisfaction and improvement in participants' lives. This year we also conducted a Participant Satisfaction Survey seeking their satisfaction levels and aiming for 95% satisfaction.

The following scores were reported in the Family survey conducted in spring of 2021:

- 93% of families were very satisfied or satisfied with Our Place overall.
- 100% of families said their participant was leading a more meaningful life because of their participation in Our Place programs.
- 100% of families said their participant was more socially connected because of Our Place.
- 98% of families said they were very satisfied or satisfied with Our Place's response to Covid.
- 88% of families said the most important feature of online programs was connecting with friends. This was the highest ranked feature.

The following scores were reported by participants in the survey conducted in spring 2021:

- 100% of participants were satisfied with Our Place programs.
- 97% said that they have more friends because of Our Place.
- 94% said they feel they have a place to belong.
- 96% said they learn new things in programs.
- 84% said they were ready to go back into the community and to ride in the van. (At this point many had been vaccinated.)

- (14) What results are you committed to achieving in the present year? (If outcomes are the same as above, simply state that we hope to improve upon the past year's results)

We hope to improve upon last year's results. We also plan to begin the certification process with the Council for Quality and Leadership this year with our new Executive Director and Program Director in place.





## AGENCY/PROGRAM APPLICATION FOR FUNDING

### Fiscal Year 2022-2023

- (15) Are there any other program effectiveness/evaluation measures you think are important, such as customer/client satisfaction surveys, quality of service measures, or other indicators? Please describe.

Direct Reporting to Families: Staff mentors check in with families and participants regularly to discuss individual goals and progress and to recommend program activities.

Information sessions and personal outreach with Transition Programs at area high schools and NSSED: This enables us to determine participant needs and discuss current practices and areas for collaboration. New Trier High School shortened its day for summer and fall and encouraged families to sign up for Our Place programs.

Ongoing assessments with vocational partners and community centers: This ensures we are performing vocational services well and are seizing opportunities to expand community integration.

#### CHANGES/CHALLENGES

- (16) What changes or challenges (legal, socio-economic, demographic, financial, political or other) did the agency, program, and clients face in the prior year? How did you respond? What challenges or changes do you anticipate in the present year? (If changes/challenges were the same for all programs, do not

The major challenges we faced this year were tied to the pandemic.

- **Balancing physical and mental health of participants:**

The first priority in addressing the pandemic was assuring the physical safety of our participants and staff. As required by the governor, we closed our in-person programs in mid-March of 2020 to stop the spread of the virus. We quickly realized that the emotional and mental health of participants was also a compelling challenge.

In normal times, over 40% of our participants experience anxiety, depression, OCD, and sleep and eating disorders. In the first week of the shutdown, we saw the severity of these conditions increase for those already experiencing them, and an increase in the number of participants suffering these conditions. This was especially troubling, because most of our participants were already socially isolated to some degree.

Many parents told us that returning to in-person programs was essential for the mental health of their sons and daughters. So we resumed in-person programs at Our Place in gradual, safe ways while retaining a full online schedule for those not ready to leave home. We implemented strong safety measures so staff felt comfortable returning.

Last fall when cases surged, we considered closing for two weeks, as many schools and agencies were doing, to curb the spread. We reached out to every family attending in-person programs to assess their views. All but one family said they wanted us to stay open. The risk of returning to social isolation was greater than the risk of contracting the virus because their participants could not tolerate online programs. The one family who chose to keep their daughter home said she



## AGENCY/PROGRAM APPLICATION FOR FUNDING Fiscal Year 2022-2023

was comfortable online and often joined Zoom programs after a full day at Our Place. She was back in-person in a few weeks.

This summer we required participants to be vaccinated. We had arranged for all staff to receive vaccinations in early spring. This enabled us to return to community outings and to somewhat reduce social distancing requirements. We saw a significant increase in social emotional wellness – and everyone was happy to see participants' smiles again as we relaxed mask requirements.

We now face the challenge of the Delta variant surge and the recommended return to stricter safety protocols, including mandatory masking. Many of our participants struggle with wearing masks for a long period of time because of sensory, breathing, and speech issues. These are the same participants who most need the social connections of being at Our Place. For now, we are prioritizing participation for all and strongly recommending masks while indoors at Our Place. We encourage participants, staff and volunteers to wear masks, but we are not making mask wearing mandatory. We spend as much time outdoors as possible and require masks while in the vans and at community venues. We know we can trust the strong community of families and staff to protect each other. We have told families that this policy could change at any time depending on the risks of spreading the virus.

We've learned to be fluid, to communicate openly with our families, and to make sure we address the complex needs of our participants and staff. We know this challenge will continue into the next year.

### **Staffing: Keeping staff fully employed and hiring an Executive Director:**

From the first days of the shutdown, our Board made a commitment to try to keep all staff fully employed and insured. We felt this was important so that we could maintain the trusting relationships participants had with staff in a time of crisis and to be able to resume in-person programs as soon as it was safe. No one expected that the shutdown would last as long as it did. We had depleted our reserves with the cost of the renovations, but received a PPP Loan to cover 10 weeks of payroll. Our staff did not return to full time status for over 24 weeks. We were able to keep every person fully employed and insured because of tight Board management and generous donations from families and donors, including the support of the Township grant.

We know the employment market is difficult. We have lost four young program staff members, which is in line with economic predictions. But we have been able to replace them with even stronger professionals. Additionally, we were able to replace our two retiring senior managers with highly competent professionals.

We put our search for a new Executive Director on hold last spring because of financial uncertainties and the need to ensure the ED could connect with our staff and participants in person. By January 2021, we saw that we had rebuilt some reserves and would be able to expand in-person programs. With a careful search, we were able to attract the perfect Executive Director who started in May.





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We know employment issues will continue to challenge us in the coming year, but feel that our commitment to our staff, attractive salaries and benefits, financial stability, and strong programs will enable us to be competitive in hiring.

#### **Financial Stability: Capital Campaign**

The past year has been filled with uncertainty requiring hard decisions. We were six weeks into our major renovation project last March when we were forced to shut down. We had committed all of our reserves to the project, but were expecting strong fee revenues in late March and income from our annual event in early April. These would help us meet operating expenses. We did not charge fees for the Spring session, even though we started online programs within two weeks. Many families sent in payments to help us survive. We took the benefit online and reached our goal. These two financial supports enabled us to survive into summer. We also got a PPP loan so were able to meet payroll for 10 weeks.

The irony of the situation was profound. We had always carried operating reserves to protect us from just these unexpected events, but had never needed to draw upon them. The Board stepped up, conducting cash flow analyses and considering cost-cutting options on a monthly basis. We followed every penny and set plans to ensure revenues, including from program fees. Within a few months we knew we would likely survive if the Covid situation did not get worse. The next challenge was to rebuild reserves. Through aggressive fundraising efforts and the offering of meaningful programs that families were willing to pay for, we survived the crisis.

We found that the renovated space enabled us to reopen safely and quickly. This reaffirmed the decision to make our permanent home in central Wilmette at the Community Church. And it enabled us to bring back our participants and welcome new ones to our programs, which ensures a fee revenue stream. We hope that our donations from individuals remain strong this year but recognize that many people may have increased their donations in 2020 to help us survive. Now that the crisis has passed, and the urgency appears to be gone, these donations may decline in 2021.

Our next financial challenge is the Capital Campaign to purchase the building. We have less than three years to raise the funds to purchase the building and set aside sufficient reserves to cover maintenance and major repairs that may arise.

#### **RECOMMENDATION RESPONSES**

- (17) How did you respond to the recommendations made by New Trier Township, if any? Please describe in detail. (These are contained in the funding letter you received in June).

#### **Make accommodations for clients who don't respond well to online services**

In our online programs, we've made many accommodations for participants who initially did not respond well to online programs. For those who found the Zoom screen too stimulating, we created one-on-one chats with staff, small discussion groups over lunch, and check-in phone calls. For those who needed less conversation and social interaction, we created visual programs where



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they could draw, listen to stories, or dance. We still offer those programs and continue to have a strong participation rate. Four participants are still not ready to return to in-person programs but are very active in online programs.

For those who needed more personal connections, we started in-person programs with strong safety protocols. We started gradually last July with small groups outdoors. In early September of 2020 we launched in-person programs at Our Place, with two sessions per day, for two and a half hours each. Programs were open to all participants who could wear a mask and maintain social distancing. We lengthened the day to five hours in January and this June we were back to a full day of programming, from 9:30 am till 5:00 pm five days a week. We required vaccinations for all staff and participants for the summer session and so were also able to offer many programs in the community. Most of our original participants have returned to in-person programs. Those who have not are in institutions that don't allow them to leave, have moved away, or increased their work hours, or are not ready to return yet. We've added more new participants to more than make up the difference and currently serve 87 participants versus 84 in 2020.

#### **Offer more in-person programming while ensuring safety of participants and staff**

This September we will continue a full schedule of programs on weekdays, from 9:30 am till 5:00 pm. and are adding in-person Saturday Socials several times per month. We anticipate that if the virus remains under control, we will be able to offer Saturday socials every week starting in January. We continue our strong safety protocols, including medical grade air purifiers, social distancing, hand sanitizing, disinfecting throughout the facility, and continual monitoring of CDC and Illinois Department of Public Health advisories.

#### **Make efforts to serve clients on a broader spectrum of disabilities**

We make every effort to serve participants regardless of their ability and currently have a diverse group of individuals. The only disqualifications for participation are violent physical behaviors that could harm the individual or others and significant medical needs that require nursing care. Staff members who have joined us from other agencies serving adults with developmental disabilities are surprised at the diversity of our participants.

- Over 25% of our participants have significant verbal communication challenges. Ten are non-verbal, and only four of them use an adaptive communication device. An additional ten to twelve participants have atypical language. Five have apraxia, which is a neurological disorder that interferes with language.
- Over 70% of our participants exhibit behaviors on the autism spectrum. Most of these individuals have dual diagnoses and additional physical and mental complications.
- Sixteen individuals have seizure disorders, including five with epilepsy.



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- Close to 30 have anxiety issues that require regulation throughout the day, including individualized staff support.
- Four individuals have mobility impairments. One uses a wheelchair and two use scooters.
- Four participants have hearing impairments which affect their ability to speak in ways that can be understood
- Two individuals have visual impairments and are classified as legally blind.
- Eighteen participants have food allergies or dietary requirements that require supervision by staff.
- The families of seven individuals have reported to us that their children have rare syndromes, with multiple medical, mental and physical complications.
- Two individuals have Type 1 Diabetes, and are insulin dependent. When they joined Our Place, no other program would serve them.

#### **Report on efforts to increase utilization of building**

We are currently fully utilizing the 8,000 square feet of space we lease in the building. When we first returned to in-person programs, we only used the newly renovated space. It has highly effective HVAC systems and enough room to allow us to maintain physical distancing. We added medical grade air purifiers to all rooms and high efficiency filters to all HVAC systems, including those in the older part of the building. So now we can use the upstairs art studio, computer lab, and program rooms. We created a Zoom room where staff conducts online programs. We also built an outdoor garden so we can hold many programs there and on the lawn.

#### **Status of possible purchase of the building**

Our lease stipulates that we have until July of 2024 to raise the funds to purchase the building. We have a \$600,000 credit against the purchase price to recognize the investment we made in the building. We are in regular conversations with the Church leadership and both they and the Our Place Board continue to plan for a purchase in 2024. We are planning to launch our Capital Campaign in early 2022 to fund the purchase.

#### **Plan for future succession of long term board president**

We are taking a two-pronged approach to a succession plan: creating leadership opportunities for targeted Board members and developing a strong Executive Director. We are seeing major advancement in both of those areas. One of our Board members is a strong leader and is preparing to take on the role of Board President in the next couple of years. She has many years of experience in nonprofit board management and a personal commitment to our mission. She is



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on the Executive Committee, heads the Governance Committee, and is engaged in the Program and Development Committees. She is planning to recruit new Board members and is working closely with the current Board President and the Executive Director on all key issues. Our new Executive Director hit the ground running when she joined us in May. She is an accomplished leader with proven management ability and excellent communication skills. She has motivated our staff, hired two effective managers, and is building relationships with our families, donors, and key community members. The founder and current Board President plans to stay involved as a volunteer after the transition and for as long as she can be useful.

#### **RESOURCES/BUDGET**

- (18) What non-financial resources are required to deliver this service? Specify staffing/volunteer requirements, budgetary needs and other resources, inputs, and/or community partners that are needed for this program. If the Township is unable to fund this program at the desired level, what will the impact be on services? Describe how your program will or will not continue without investment by the Township. Complete the attached budget forms. Were any cost reduction measures implemented in the prior year? If there is a sliding fee scale for this program, please attach it and indicate how many clients paid each fee level.

**Specify staffing/volunteer requirements, budgetary needs and other resources, inputs, and/or community partners that are needed for this program.**



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#### **Volunteers and Partnerships**

- Peer volunteers are critical to our success because they provide modeling and friendship to our participants, especially in improving their social skills. New Trier High School, Loyola Academy, and North Shore Country Day School provide volunteers. All of these schools are eager to restart volunteer activities this fall.
- Adult volunteers from the community assist in both direct program activities and in fundraising, managing the annual event, and developing community partners.
- Other non-profit agencies provide volunteer opportunities for our participants to develop work skills and integrate in the community. While many agencies are cautiously resuming programs, we are excited to be returning to the Township food pantry in September and are in discussions with Three Crowns Park, the Winnetka Thrift Shop, and Glencoe Public Library to resume programs when feasible.

#### **Staffing Requirements:**

- To ensure that participants achieve their goals and that we provide person-centered services, we maintain a low staff to participant ratio and provide professional staff development.
- We also provide focused support for those individuals with emotional and behavioral issues. Our new Program Director is experienced in behavior management and has already started developing plans for participants. We have hired specialized staff, added a quiet room, and are developing specialized programs to address these needs. As these individuals improve their skills they will be able to join the larger groups at Our Place and integrate more fully in programs that take place in the community.

#### **Budgetary needs and resources:**

- We continue to focus on maintaining a healthy balance of revenue generation from program fees, events, donations, and grants. We are focused on increasing individual donations and especially major donors. The Township grant is now 13% of our total revenues, a rate that will continue in 2021 with a grant of \$135,000.
- We maintain fees at a competitive level so families can afford our programs. Therefore, fees generate only 50 - 60% of revenues.
- We budget to have financial reserves of three to eight months of operating expenses. The importance of that policy was reaffirmed with the Covid shutdown when we did not charge fees for the spring session and had committed all of our existing reserves for the renovation. Through careful monitoring we have been able to rebuild and now have seven to eight months of operating reserves.



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**If the Township is unable to fund this program at the desired level, what will the impact be on services? Describe how your program will or will not continue without investment by the Township.**

#### **Township Investment:**

Township funding is vital to our program from both a financial and community support standpoint. We have made significant advances in broadening our base of individual, community, and foundation support over the years. As our participant base has expanded to include 14 communities, we receive financial support from those families and communities outside the Township.

We continue to rely on the Township's grant to deliver services to residents of our community and to provide programs at an affordable rate. Township families face a significant financial burden. Many do not receive state funding and must therefore pay the equivalent of a college tuition every year to support their adult children who have disabilities.

The Township investment per resident served was \$3095 in 2020, with 42 Township participants. With this support, families can access close to 40 hours of in-person programs per week and 25 hours of online programs at Our Place.

The cost to families for programs at Our Place is \$15 per hour in-person and \$13 per hour online. This is well below the cost of personal care in our area of \$18 - \$25 per hour.

If we did not receive funding from the Township, we would likely have to reduce staff, decrease program hours, curtail community-based programs, and limit the number of participants served. This would have a dramatic and negative impact on Township families.

#### **Complete the attached budget forms. Were any cost reduction measures implemented in the prior year?**

As we return to full in-person programming we are evaluating all of our costs but have not had to implement any cost reduction measures.

#### **If there is a sliding fee scale for this program, please attach it and indicate how many clients paid each fee level.**

We do not have a sliding fee scale, but offer fee waivers for families who request financial support. We also reach out to families if they decrease their participation to determine if they would register for more programs with financial support. We pay special attention to Township residents in granting fee waivers.

(19) If your program or agency budget request represents an increase from last year, please explain the reason for the change and what the increase will be used for.



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We are requesting a modest increase to reflect the growth in the number of participants enrolled and the projected additional growth, the need to run both online and in-person programs to meet the needs of participants, and the increased costs of operating with safety protocols.