

**Prospectus**  
**Qualifications and Services**

# Creative Edge Consulting

**Specializing in Non-Profit Development, Sustainability, and Growth**

**Mary E. Costello**  
**Independent Consultant**  
**Grant Writing & Program Development**  
**6047 Wild Ginger Court**  
**Columbia, Maryland 21044**  
**Phone: 443-545-5863**  
**MaryCostello@CreativeEdgeConsulting.org**  
**[www.CreativeEdgeConsulting.org](http://www.CreativeEdgeConsulting.org)**

**Winter 2010**

Prospectus-S

# Table of Contents

My Journey (Bio) .....	1
Consulting Services List .....	2
Organizational Assessment .....	3
Sample Contract .....	4
Resume/Executive Summary .....	5
Areas of Non-Profit Experience/Expertise .....	7
References .....	9
Work Samples/ Agency Snapshots .....	10

# *MY JOURNEY*

**Mary E. Costello** is a 1987 graduate of The Catholic University of America, where she studied both Social Work and Drama. Her full-time non-profit service began in 1984, marking the start of a long and successful career in Social Work Administration—primarily in the mental health and developmental disabilities fields.

In directorship roles from a young age, Mary became known in the Maryland area for her strengths as a program developer. Creating several agencies from the “ground up” and revamping others in danger of closure due to serious state licensing deficiencies, she gained a solid reputation for innovative solutions to typical and atypical non-profit challenges.

Her grants history dates back to 1987, including negotiating and winning a 2.8 million dollar contract with the State of Maryland Department of Health & Mental Hygiene/Developmental Disabilities Administration to start-up and operate the residential social services agency she founded in 1992, Creative Options, Inc. This program was highly respected for its unique approaches to supporting persons with histories of repeated (so-called) “failure” to successfully live in the community due to the presence of multiple, co-occurring diagnoses complicated by significant behavioral issues.

Before becoming an independent consultant, Mary served as a full-time Grant Writer/Fundraiser for an independent school that educates children with learning differences and language delays/disorders. She now offers a wide range of support services to non-profits throughout the United States—specializing in new organizational start-ups as well as the restructuring, improvement, sustainability, and expansion of more established agencies.

Since forming **Creative Edge Consulting** in February of 2005, Mary has been instrumental in the receipt of over 14.5 million dollars in grant and other funding among her collective customer roster.

# Consulting Services

Executive Coaching (Non-Profit)  
Budget Development  
Grant Proposals/RFPs  
Corporate Sponsorship Packages  
Funding Prospect Research  
Fiscal Development Plans  
Organizational/Program Assessment  
Non-Profit Program Development  
Organizational Systems Creation  
Quality Assurance Programs/Protocols  
501(c)(3) Applications  
Letters of Inquiry  
Brochures & Marketing Tools  
Policies & Procedures  
Program Evaluation Tools/Protocols  
Staff Training/Employee Manuals  
Staff Training Workshop Facilitation  
Creative & Technical Writing  
Newsletters & Annual Reports  
Strategic Planning/Capacity Building  
Board of Directors Retreat Facilitation  
General Editing/Re-write Services  
Scripts & Screenplays  
Speeches  
Fundraising Plea Letters  
Ghostwriting  
Songwriting  
Web Design/Web Copy

# Organizational Assessment

If you are not certain what type of services you need or how intensive the supports should be... Here are some things we will talk about to help you decide the next steps of our work together:

- TRACK RECORD** - Fiscal and programmatic
- LONGEVITY** - Newer programs struggle to get initial funding
- IMPACT** - Numbers served and plans, if any, for expansion
- POPULATION** - Is it a group that is typically funded well?
- GEOGRAPHIC LOCATION** - Most available funding starts with location
- REACH** - Are you local/community-based, state-wide, or national?
- INNOVATION** - Are you different from other programs?
- VISIBILITY** - Have you grabbed media attention? Want to?
- ACCOUNTABILITY** - Have you met all reporting requirements?
- LEADERSHIP CREDENTIALS** - Are you qualified to do what you aim to do?
- FISCAL STANDING** - Are you in hot water right now? Quality of accounting systems
- VISION** - Have you already determined where you want to be in 3-10 years?
- PREVIOUS SUPPORT** - Has anyone funded you before? Who and at what levels?
- GOVERNMENT SUPPORT** - Are you eligible and/or do you try to avoid regulations?
- SCOPE OF SERVICES** - How many programs and what type(s) do you operate?
- PROOF OF SUCCESSES** - How do you measure your success? Is it scientifically-based?
- DEMONSTRATION OF NEED** - Why is this programming necessary? How do you know?
- RESPONSIVENESS TO SOCIETAL CHANGE** - Is your program the same as 25 years ago?
- ORGANIZATIONAL SYSTEMS** - Is everything in place and working well?
- TURNOVER** - Do staffing issues need to be resolved? Pay/morale/staff shortages?
- NON-PROFIT TRENDS** - Are you using old language and service models?
- QUALITY ASSURANCE SYSTEMS** - Do you have and follow a set plan for internal review?
- PARTNERSHIPS** - Do you work with other organizations to enhance each other's offerings?
- STRENGTHS AND NEEDS** - What helps and hurts you right now?
- DIVERSIFICATION OF FUNDING** - Are you limiting yourself? Is more possible?
- INTERNAL FUNDRAISING EFFORTS** - What is your history with events, plea letters, etc?
- GRANT FUNDING GOALS** - How much is needed & for what? Any built-in sustainability?
- BOARD OF DIRECTORS** - Roles, responsibilities, active/inactive, and personal donations
- STRATEGY** - Do you have a formal strategic plan? If so, are you on track with your goals?
- BUDGET** - Do you have a formal, detailed budget for current operations and new needs?
- WRITTEN MATERIALS & MESSAGE** - How do you stack up against other non-profits?
- MEDIA USE** - Website, social network sites, email blasts, brochures, etc.
- IMPROVEMENT NEEDS** - What have you identified as agency weaknesses?
- PROGRAM DEVELOPMENT NEEDS** - What can you do yourself/where do you need help?
- PRE-EXISTING MATERIALS** - What can we use? What needs to be newly created?

...and so forth

# Consulting Agreement

This agreement is entered into on this [redacted] day of [redacted], between [redacted] (Phone: [redacted]), herein known as Client, and Mary E. Costello of 6047 Wild Ginger Court, Columbia, MD 21044 (Phone: 443- 545-5863), herein known as Consultant.

Under this agreement, the Consultant shall:

1. Provide program development assistance and grant writing services, including prospect research, to be compensated at a rate of \$75 per hour. The scope of such services shall be determined by mutual agreement and may extend beyond typical parameters of such responsibilities at the request of the Client.
2. Provide a weekly accounting of hours accrued through email or by fax, including retainer balance amount, billable in 15-minute increments.
3. Surrender all materials completed to date, provided that payment has been received. The Consultant is entitled to withhold any or all materials until fees have been paid.
4. Ensure that all written materials are original works and shall be, to the best knowledge of the Consultant, appropriate for the purpose for which they are developed.
5. Be available, as reasonable, for phone consultations with Client.

Under this agreement, the Client shall:

1. Provide upfront payment in the form of a retainer, from which the Consultant will bill for the services that are provided each week. Additionally, the Consultant will include regular balance information to the Client indicating hours worked. The retainer shall be made payable to Mary E. Costello in the form of a personal/company check. Upon exhaustion of said retainer, the Client will forward additional retainer funds, continuing to pay in advance for the Consultant's services. Absence of retainer funds will result in all work placed on "hold status" until new payment is received by the Consultant.
2. Provide, in a timely manner, all necessary materials required by the Consultant to complete assigned tasks. This includes reasonable email and phone responsiveness to all questions and draft edit needs.

Both parties agree to the following:

1. This contract may be cancelled at any time by either party, and for any reason. Upon cancellation of this consulting contract, any unused portion of the retainer will be promptly returned to the Client.
2. The Consultant is in no way responsible for any legal or accounting issues that may arise out of the use of any written materials or obtaining of grant funding, and cannot provide legal or accounting counsel of any kind. The Consultant will, however, advise the Client, based on her experience, about potential considerations throughout this process. Additionally, the Consultant accepts this contract in good faith that the potential for grant funding and corporate sponsorships is likely or possible, however no guarantee shall be made regarding the receipt of grant awards or other funding.
3. Work shall be compensated at a rate of \$75 per hour. Incidental costs, if any, such as postage or duplication costs shall additionally be deducted from the retainer, with receipts furnished to the Client.
4. Consulting fees are subject to change at any time with 30-days written notice provided by the Consultant.

[redacted] \_\_\_\_\_  
date

Mary E. Costello \_\_\_\_\_ date  
Independent Consultant—Creative Edge Consulting  
Grant Writing & Program Development

# Mary E. Costello

---

6047 Wild Ginger Court  
Columbia, MD 21044  
(443) 545-5863  
MaryCostello@CreativeEdgeConsulting.org  
www.CreativeEdgeConsulting.org

**OBJECTIVE:** To serve in a challenging leadership role within the human services field, utilizing my strengths as a change agent and team builder, while striving to offer the highest quality services for the community, program, or service recipient. To offer grant writing and program development assistance to non-profit organizations on a consulting basis.

**EDUCATION:** 1987- BA in Social Work, The Catholic University of America, Washington, DC  
+2 years Drama Department curriculum (CUA does not offer AA degrees)

## **MOST SIGNIFICANT ACCOMPLISHMENTS**

- Currently serve as an independent consultant offering a wide range of support services to non-profits throughout the United States – specializing in new organizational start-ups as well as the restructuring, improvement, sustainability, and expansion of more established agencies. Heavy emphasis on program/organizational development and operational efficacy. Funding pursuits include foundation, corporate, city, state, and federal grant applications, plus private donations and corporate sponsorships. Over 45 non-profits have been served since February of 2005, and I have been instrumental in the receipt of over 14.5 million dollars in funding among my collective customer roster.
- Wrote a grant/budget proposal in 1992 resulting in the negotiation and award of a 2.8 million dollar, 3-year contract with the State of Maryland to start-up and operate the residential human services agency I founded, Creative Options, Inc. Respected in the field for unique approaches to supporting dually diagnosed persons deemed "difficult to place" by the State of Maryland due to the presence of significant behavioral challenges and long-time histories of failure to successfully live in the community. Offered highly customized, viable alternatives to State institutionalization while providing these individuals with an opportunity for a higher "quality of life."
- Between 1990 and 1994, created two brand new residential programs from the ground up and completely revamped operational systems for two others. Positions required long-range strategic planning, as well as attention to the minute details of daily program operations.
- Within my first four months of employ, brought one troubled agency from the brink of program closure, due to what was cited by the State as "deplorable conditions," to experience their first full licensing renewal in the history of that organization. In fact, no deficiencies could be detected during this licensing review. This undertaking involved a complete overhaul of the program, clinically and operationally, as well as addressing the serious physical plant issues within each of the 15 residential homes—which included a disturbingly high degree of health & safety violations.
- Member of the team of professionals which developed and implemented a progressive, "State of the Art" project with the University of Maryland at Baltimore-Developmental Disabilities Community Support & Access Unit/ Maryland Developmental Disabilities Administration. Introduced a new and exciting "person-centered" approach to supporting children and adults with disabilities in Maryland while substantially reducing the State costs per client, per year.
- Fostered environments where staff felt valued and respected, as well as an instilled sense of "ownership." As a result, morale was unusually high despite the day-to-day trials of human services work. Teams worked well outside the parameters of typical job descriptions and the outcomes proved, again and again, to be quite impressive. One example of this was mobilizing clinical staff to address the physical plant issues of 15 residential homes that included repairs, painting, cleaning, etc. They spent 3 months doing this each day, even though I would not require it of them. Still, they stepped up to the plate to work *alongside* me to resolve this program's crisis (see bullet statement #4). This is a good and fair indication of my management style and the type of work setting I've created for many organizations.
- Founded four successful businesses.

## **CAREER HISTORY** (partial)

**Independent Consultant** --Creative Edge Consulting, Grant Writing & Program Development (2004-present)

**Grant Writer/Fundraiser** --Norbel School, Elkridge, MD (July 2004-February 2005)

**Self-Employed/Owner of 3 business ventures** --Acoustic Blue Productions-DJ & Karaoke Services, Creative Edge Consulting, INK, and Whistle While I Work –Owings Mills, MD (1994-2006)

**Program Director** --Center for Community Development, Capital Heights, MD (1993-1994)

**Executive Director/CEO/ Founder** --Creative Options, Inc., Ellicott City, MD (1992-1993)

**Developmental Disabilities Specialist** --Univ. of MD, Comm. Support & Access Unit/DDA, Baltimore, MD (1991-1992)

**Interim Project Coordinator/Consultant** --Careco, Inc., Washington, DC (1991-1991)

**Director of Maryland Operations** --English & Condray, Ltd., Silver Spring, MD (1990-1991)

**Program Director** --United Cerebral Palsy Association, Bowie, MD (1989-1990)

**Services Coordinator** --Disability Support Services, PG County Health Department, Landover, MD (1988-1989)

**Manager, DD Employee Assistance Program** --Melwood Training Center, Upper Marlboro, MD (1987-1988)

## **EXPERIENCE/ SKILLS SUMMARY**

*(reflects my history prior to my consulting work)*

- **Administrative:** Grant writing/budget development, as well as drafting or revising personnel/program policies & procedures for multiple organizations. Created staff/consumer training materials and ensured that trainings took place in accordance with State regulations. Completion of plans of correction (as needed) and other reports, collection of statistical data, and provision of all documentation, as required. Public speaking, marketing, and community education. Team building. Strategic planning and establishment of short-term/long-term goals, measurable outcomes, and overall program vision. Fiscal oversight. Website development. Creation of brochures, flyers, business cards, as well as other promotional tools. Spearheaded successful marketing initiatives & sales. Fundraising. Prospect research.
- **Supervision/Management:** Staff recruitment, training, coaching, & supervision. Created two new programs and revamped two existing ones. Management of five programs. Daily operational oversight of residential, day, psycho-social recreational programs for dually diagnosed, MR/DD, DD/CMI, NR/DD, CMI, deaf, blind, persons with Cerebral Palsy, persons with physical disabilities, those deemed "difficult to place" due to severe behavioral challenges, and two congregate living facilities for the aged. Devised Quality Assurance protocols and targeted strategies to address problem areas while implementing initiatives to continually improve service delivery systems.
- **Clinical/Advocacy:** Wrote IHPs, ISPs, and Behavior Change Plans. Trained staff on implementation of client training programs and the collection of necessary data. Devised teaching methodologies. Performed client assessments and facilitated "Essential Lifestyle Plans"/"Personal Future Plans" process. Liaison between consumers, families, State governmental regulatory/oversight systems, political offices, and community service providers. Counseling, case management, advocacy, community outreach, new skills training acquisition, and crisis intervention.
- **Entertainment/The Arts:** A thespian, professional singer/songwriter, composer, illustrator, and literary writer. Have performed as a vocalist/entertainer in the Baltimore area for the past 20 years. Popular Karaoke Host/DJ in the region.
- **Personal Qualities:** Creative, tenacious, humorous, possession of a "can do" personality, dedicated, strong verbal and written communication skills, an eye for detail, solid organizational skills, enthusiastic, a proven leader, and passionate about social causes and policy. Equally as effective when working independently or as a team player. Known for thinking "outside the box" and the ability to take a concept and "hit the ground running."

# My Previous Work

## Including Both Traditional Workforce Roles & Consulting Services

### Advocacy

All Types of Disabilities  
Women's Issues (Work-life Balance, Job/pay Equity, Educational Opportunity)

### At-risk Children & Youth

After-School Programs  
Foster Care Outreach  
Summer Programs  
The "Boy Crisis" - *The Boys Project/University of Alaska-Fairbanks*  
Work Readiness/Risk Avoidance Training

### Community/General

Child Burial Assistance Foundation for Low-Income Families  
Cultural/Community Centers  
Deinstitutionalization  
Homelessness  
Jobs Training and Development  
Life Skills Training  
LGBTQ  
Non-Profit Program and Organizational Development  
Poverty Issues  
Professional Workforce Clothing Program for Men  
Psychosocial Recreational Programs  
Residential Programs (disabilities, medically fragile children and adults, recovery)  
Senior Citizen Outreach Services  
Senior Living Facilities  
Weight Loss Classes/Behavior Modification Strategies  
*YouthBuild* – Low-Income Housing and Workforce Development  
Volunteer/Community Service Programs (Children, Teens, and Adults)

### Disabilities

Behavioral  
Community Education, Public Speaking, and Outreach  
Degenerative Health/Illness  
Family Support & Education  
Intellectual  
Learning  
Not-Criminally Responsible Persons with a Documented Disability  
Person-Centered Planning  
Physical  
Psychiatric  
Support of Persons with Dual or Multiple Diagnoses

## **Education**

Alternative Public Schools for At-Risk Teens  
Charter Schools  
Daycare/Pre-school  
Public Schools - Elementary  
Service Learning Projects  
Sober High Schools  
Special Education  
The “Boy Problem” – *The Boys Project- University of Alaska/Fairbanks*  
Title I Supplemental Educational Services

## **Health**

Cancer and other Illnesses  
Facial Reconstruction Surgeries for Children  
Free Dental Clinics for Children  
HIV/AIDS  
National Health Educational Awareness Campaigns  
Pregnant Teens and Young Women (Homeless)  
School-based Chiropractic Screenings/Care  
SIDS, Stillbirth, and Other Infant Death  
Substance Abuse & Recovery

## **Mental Health**

Casemanagement for Persons with Chronic Mental Illness  
Client Assessment and Support Plans  
Counseling (Individual, Couples, Group, and Family)  
Employee Assistance Program for Persons with Disabilities  
Grief & Healing Workshops for AIDS “Buddies” at Gay Men’s Health Crisis, NYC  
Mind-Body Techniques/Trauma Resolution  
Psychosocial Rehabilitation

## **Organizational**

Board Development & Training  
Budget Development and Contract Negotiations  
Complex Program Development—A through Z, new programs and project expansions  
Executive Coaching  
Fiscal and Program Development Plans  
Funding Prospect Research  
General Materials Development and/or Editing Services  
Grant Writing and Other Fundraising Activities (Sponsorships, donor letters, events, etc.)  
Individualized Teaching Curricula for New Skills Acquisition  
Organizational Systems and Protocols  
Policies & Procedures (Program and Personnel)  
Program and Organizational Evaluation  
Quality Assurance Program Design and Implementation  
Staff and Consumer Training Modules/Manuals  
Staff Recruitment, Training, Supervision, and Performance Evaluation  
Strategic Planning

# References

Diane Taylor  
President  
Pass It Along  
Sparta, New Jersey  
Phone: 862-266-5859 (c)  
Email: [diane@passitalong.org](mailto:diane@passitalong.org)

Kate Yaskovic  
Executive Director  
Birth Haven  
Newton, New Jersey  
Phone: 973-579-7979  
Email: [kate@birthhaven.org](mailto:kate@birthhaven.org)

Judith Kleinfeld, Ed.D.  
Professor of Psychology  
Director, The Boys Project  
University of Alaska-Fairbanks  
Fairbanks, Alaska  
Phone: 907-474-5266  
Email: [ffjsk@uaf.edu](mailto:ffjsk@uaf.edu)

Judy Reed, Ph.D.  
Principal  
Dane County Transition Schools  
Madison, Wisconsin  
Phone: 608-819-6321  
Email: [MandMLover@aol.com](mailto:MandMLover@aol.com)

Robin Marohn  
President, Board of Directors  
Aaron Meyer Foundation  
Madison, Wisconsin  
Phone: 608-268-7328  
**(Note: Reference prefers email contact for this purpose)**  
Email: [rmarohn@heartlandcu.org](mailto:rmarohn@heartlandcu.org)

# Work Samples

(Excerpts Only)

**Peacemaker Family Center - \$978,000** (1 year grant award)  
**Audience/Funder: Governmental Agency**

**Birth Haven** - Approximately **\$35,000** from just one plea letter  
**Audience/Funder: General public (faith community slant)**

and **\$15,000** for Life Skills Training and Computer Center  
**Audience/Funder: Foundation grant**  
**(Outcome pending - Second tier of review in progress)**

**Club Horizon - \$40,000**  
competitive GlaxoSmithKline **IMPACT** Award (which is not a grant)  
**Audience/Funder: Corporate giving**

# Agency Snapshot

**Peacemaker Family Center - \$978,000** (1 year grant award)

**Audience/Funder: Governmental Agency**

The attached grant sample was for this agency to provide out of school programs for at-risk children and youth in Miami-Dade County, Florida. Out of 160 existing service providers, only 80 were renewed for funding due to drastic budget cuts in the county.

*We scored 8th best out of 160 proposals.* (This may have been higher if the client agency was equipped to support children with disabilities. Our rubric rating was automatically lowered due to a lack of formalized outreach and programming for this population, as we fully expected.)

That same year, I also helped this organization secure **another million dollars** through one governmental grant application to South Florida Workforce to provide services to youth and young adults. I additionally led them through the application process for establishing a new charter school, an intensive project that spanned a little over three months. (The table of contents is attached to demonstrate the magnitude of work involved in a charter application.)

Preliminary prospect research was also conducted for this agency. **Total funding targets identified: 56**

**Total Consulting Costs for the Year: \$39,000**

## Agency Narrative (1 page/10 points)

### Agency Mission Statement

Peacemaker Family Center serves and mentors individuals and families as they transition from crisis to self-sufficiency.

### Agency Description and Organizational Capacity

Established in 1960, Trinity Church serves a present congregation in excess of 4,000 persons. Pastoral and support staff fully reflect the rich diversity of the Greater Miami-Dade County community, both ethnically and linguistically, and participant demographics include Caucasian, African-American, Caribbean, Haitian, and Hispanic populations. In 2000, Trinity Church created the Peacemaker Family Center (PFC) to address the tremendous societal needs of individuals and families in the region. Serving as a base for social services, PFC currently supports more than 1,000 people per week through its North Miami, Miami Gardens, and satellite Out of School (OOS) locations.

PFC's comprehensive community-based programming includes our North Miami Neighborhood Resource Network, Disaster Preparedness project, food bank, job development services for youth and adults, AmeriCorps activities, Service Partnership for Children of Inmates, Healthy Relationship initiative, Community-Based Abstinence Education initiative, Trinity Christian Academy daycare program, Peacemakers Youth Leadership Institute, ACCESS program, and our year-round Out of School offerings. Through substantial partnerships with other local organizations, PFC capitalizes on available resources, enhancing efficiency and impact of all programs.

Successfully operating Out of School programs since 2003, PFC currently provides services at four separate site locations. Each is staffed with a site director who is charged with program planning and implementation in accordance with core activity standards. Likewise, each is responsible for ensuring that recordkeeping and data collection are in compliance with our Trust contract. These professionals report directly to the PFC Director of Education, the agency-assigned administrator of OOS programs.

PFC remains diligent in response to requests for information, submission of all reporting and invoices as required, and formulation and implementation of Plans of Correction when indicated. Our organizational history is solid in this regard, maintaining full compliance with all Children's Trust contractual demands. Any deficiencies detected in prior reviews were quickly addressed and resolved. While we scored quite respectable overall averages of 92% on our 2006 review and 91.73% on 2007's evaluation, we strive to continually improve our service delivery and accountability processes. Our consistently high evaluation scores clearly demonstrate unquestionable capacity to provide safe, quality Out of School programming for children in Miami-Dade County. Any invoicing irregularities were systemic for all providers as fiscal reporting and requirements were altered by the Trust, in addition to working through budget modifications with Trust finance staff earlier this year. We believe that PFC has always met, at a minimum, a compliance rate of 85% in invoice accuracy and the timeliness of such submissions.

### Program Narrative

### Program/Service Summary (75 words/3 sentences—not scored)

Trinity Church's Peacemaker Family Center (PFC) Out of School program provides afterschool and summer enrichment programming for children, ages 5 – 15. Through a variety of unique, multi-disciplinary activities conducted in a fun and stimulating environment, the Out of School program promotes exploration of individual talents and interests in fine arts and sports, enhancement of educational and social skills, and the development of a true love for learning.

## Statement of Need / Target Population (1 page—8 points)

TOTAL number of unduplicated children/youth participants to be served by this program across all sites for After-School 2008-09: 345

TOTAL number of unduplicated children/youth participants to be served by this program across all sites for Summer Camp 2009: 515

The National Institute on Out-of-School Time at Wellesley Centers for Women's 2007 document, Making the Case: A Fact Sheet on Children and Youth In Out-of-School Time, reports that "lack of adult supervision and participation in self-care for both children and adolescents have been linked to increased likelihood of accidents, injuries, lower social competence, lower GPAs, lower achievement test scores, and greater likelihood of participation in delinquent or other high risk activities such as experimentation with alcohol, tobacco, drugs and sex." The fact sheet further indicates that, on a national level, "the parents of more than 28 million school-age children work outside the home, with as many as 14 million "latchkey children" returning to an empty house on any given afternoon."

Using a "cradle-to-career" study framework, Education Week's Quality Counts, Florida Highlights (January 2008) report scores the entire state as an overall "C" against the national average of a "C-minus" rating. The document states that "despite below-average current achievement, Florida finishes seventh nationally, a result that can be attributed to very strong improvements in recent years and relatively small poverty gaps."

In contrast to state-wide ratings regarding poverty, the children supported by PFC's past and current Out of School programs generally come from low-income or working poor families, with approximately 60% living in single parent households. Most would be categorized as "at-risk." All are eligible for free lunch during our summer program and attend public schools where, collectively tallied, 87% of the student body receives free lunch during the school year. (Statistical information about school lunch rates was obtained from *Your Florida Department of Education* website and is specific to schools our kids attend.)

In order of highest to lower priorities, as per Trust map listings (single parent/free lunch), PFC proposes services at five sites: Holy Cross, Genuine Love, Trinity North, Trinity South, and, finally, Fit Kids—none of which are located in CRA areas. These locations, however, do present high concentrations of both free lunch recipients and single parent homes. At all locations, safe and structured programming emphasizes literacy and social skills development, physical activity and fitness, strong family involvement and outreach, the arts, various sports, and nutrition. (See attachment on Trinity South programming)

PFC serves both boys and girls, ages 5-15, in year-round Out of School programs. Although all children in need of our services are welcome, racial and ethnic demographics have historically included Caucasian, African-American, Caribbean, Haitian, and Hispanic populations. PFC also accepts children with disabilities on a case-by-case basis, provided our program can fully accommodate their individual challenges. Any child that requires on-site medical care, personal care attendants, 1:1 staffing or extensive behavior modification support would not be appropriate for our program at this time. Conversely, PFC can effectively serve those with milder challenges, such as a wide range of learning differences, ADD/ADHD, and higher functioning children with a variety of developmental disabilities. (Please see supplemental page for further clarification.)

PFC traditionally serves more children than required through contractual funding, as evidenced by our current utilization rate of 105%. For this reason, marketing activities will remain largely the same, focusing on Spirit magazine, postcards, radio and TV commercials, brochures, and public interest articles through the media. Consistently, Out of School vacancies are filled well in advance of program start dates. Enhanced outreach for parents of children with disabilities will occur as well, including revising our materials to specifically welcome this population and working with relevant community programs.

## Program / Service Description (2 pages—15 points)

PFC provides a critical parental solution to after-school and summer time for children and youth, ages 5-15. The Out of School program's primary goal is to offer a fun, safe, structured, and learning-based environment for children in Miami-Dade County that additionally promotes physical health, active participation in the arts and sports, and development of a love for learning.

Operating Monday through Saturday during the school year and Monday through Friday for summer activities, PFC's OOS program take place at four site locations: Holy Cross (33161), Genuine Love (33055), Trinity (33169), and Fit Kids (33165). PFC also operates a licensed day care and Voluntary Pre-School (VPK) program at Trinity Church's South Campus (33168). Currently, the entire OOS program supports 515 children during summer months and 345 in after-school programming through Children's Trust funding. PFC proposes services for the same numbers of children through contract renewal with the addition of Trinity Church's South Campus. Programming will be provided in collaboration with eight (8) community partners that include Holy Cross Christian Day School, Genuine Love Ministries, Fit Kids, Inc., Community Action Agency, Dr. J's Family Weight Loss Program, University of Miami Families First Network, KAM Consulting, LLC, and Service Partnership for Children of Inmates.

OOS programming is generally the same for both summer and after-school activities, and each site includes core areas of literacy, family outreach and involvement, nutrition, physical fitness, the arts, sports, and social skills development. Some minor differences in scheduling exist between the four sites based on individually available resources, staff expertise, and some heightened programmatic focus. For example, three out of four sites have full computer labs, although the fourth does have computers for children to use for homework. One site offers an opportunity to learn American Sign Language and participate in student government activities. Another, Fit Kids, provides an increased focus on fitness and has additional exercise equipment on the grounds, effectively addressing the problem of obesity and poor physical health in today's children. Trinity North has half-day Saturday programs (school year).

Despite relatively minor scheduling variances, programming is consistent throughout to meet all core area requirements. While at one site all attendees typically participate in art or another activity at the same time, subgroups offer modifications to that activity based on developmental and age-appropriate considerations. Also, PFC provides daily busing for children who do not attend school at the locations where OOS activities take place, as well as for field trips.

Documentable outcomes are measured on literacy skills and physical fitness, targeting an improvement or maintenance rate of 85% of participants in both. Assessment tools include the 1-Minute Oral Reading Fluency and SPARK Fitness Program, respectively. General outcomes and rationale of the program involve provision of safe and structured daily programming for children who would otherwise be going home to an empty or improperly supervised household. The natural benefits, which are inherently central to all programming, emphasize development and support of the "whole child"—educationally, socially, physically, and emotionally. Of course, increased familial functioning is also targeted.

Individual or societal challenges rarely exist in isolation. Rather, one problem faced by a family unit or larger community system is likely to be interconnected to many others as well. In response, PFC employs a comprehensive "systems of care" model to address the multi-faceted layers of human need.

According to the U.S. Department of Health and Human Services' Children's Bureau, "systems of care" is a service delivery model that builds partnerships to create a broad, integrated process for meeting families' multiple needs. This approach is based on the principles of 1) interagency collaboration, 2) individualized, strengths-based care practices, 3) cultural competence, 4) community-based services, and 5) full participation of families at all levels of the system. A centralized focus of systems of care is building the infrastructure needed to result in positive outcomes for children, youth, and families.

PFC has utilized this best practice approach for eight years, successfully coordinating and/or providing a

wide range of services for a community in need. For instance, when a potential OOS family begins the registration process for their child, they are informed about all of the social service programs available within the Peacemaker Family Center. At any given time, one family may have a child in the OOS program, a teenager in the Peacemaker Youth Leadership Institute, a parent in the Healthy Relationship classes, etc., in addition to receiving help through our food bank, job development program, daycare center, and referral to other social service programs. Historically, when PFC has detected unmet needs for families and the greater Miami-Dade County community, the organization either partners with an existing agency to better address the issues or creates a brand new program component within our internal service "system."

In direct alignment with this systems of care approach, other best practices, such as findings by the Harvard Family Research Project (HFRP), emphasize "complementary learning" - a systemic approach which intentionally integrates both school and nonschool supports. This idea highlights evidence that increasing children's success in learning and in life relies on contributions of not just schools, but also families, after-school programs, and other community supports. Complementary learning, in its most effective form, requires strong links between these people and settings. PFC's long history of successful community partnerships illustrates our adoption and effective application of this best practice.

One example of this is a 2007 partnership between the University of Miami School of Medicine and PFC that resulted in a research study of 413 OOS children's age, weight, and family nutrition and health habits. Findings reinforced the universally accepted reports that poor eating habits and excessive television watching significantly contribute to weight problems in children, but we were also offered other considerations for new programming. In particular, parental roles in both the study and in daily attitudes regarding diet and exercise indicate a need for greater outreach to parents. Only 83 of the parents agreed to participate in this study, which is alarming considering the results indicated that 52.8% of the children were either at risk for being overweight or overweight. Researchers stated that while their findings were somewhat limited by a small sample size, the data suggests higher prevalence rates than are seen nationally. As a result, a new partner has been added to our efforts and "Dr. J's Family Weight Loss Program" will be incorporated into summer programming in 2008 (and school year, too, thereafter).

PFC's Out of School program has been funded by the Children's Trust since 2003 and has steadily grown to now include 5 site locations. Due to the tremendous need in the region, PFC has continued to serve more children than is required through our current and past Trust contracts. In fact, over the last three years, more than 2,500 unduplicated children and youth have participated in PFC Out of School Program activities including summer camp, after-school programming, Saturday Fine Arts Classes, and the JamFest (an at-risk youth outreach event). This past August, more than 700 children participated in five summer recital performances, attended by approximately 2,000 family members and friends.

Evaluation results have consistently shown high marks, as evidenced by our most recent Trust monitoring summaries from November 2006 and 2007 which indicate 92% and 91.73% Overall Average rates. Attendance was scored at 100% in both reports. Citations during the earlier review were either isolated problems or minor systemic issues, all of which have since been resolved by PFC administration. Further, running a recent Programmatic Utilization Report on the Children's Trust website on December 6, 2007, PFC's OOS utilization scoring touts an impressive 105.11% rate between 06/01/07 and 08/19/07. (See attached supporting documentation/additional utilization rate comments.)

The OOS program is inclusive of children with disabilities and reasonable program modifications will be made to reflect the developmental skills and needs of each child. Although the OOS program will offer services for teens up to age 15, PFC has, through funding by the South Florida Workforce, opened a new program called the Peacemaker Youth Leadership Institute. This program serves younger youth, ages 14-18, and older youth, ages 19-21, utilizing a risk avoidance/crime prevention curriculum, "A Life Options Curriculum." Teens ages 14 and 15 may be appropriate for one program more than the other, dependent on individual needs and interests.

# Table of Contents

<b>APPLICATION COVER SHEET</b> .....	<b>2</b>
<b>I. EDUCATIONAL PLAN</b> .....	<b>3</b>
1. MISSION, GUIDING PRINCIPLES AND PURPOSE .....	3
<i>Mission Statement</i> .....	3
<i>Guiding Principles and Purpose</i> .....	3
2. TARGET POPULATION AND STUDENT BODY .....	9
<i>Anticipated Target Population</i> .....	9
<i>Enrollment Plan</i> .....	10
<i>Compliance with Class Size Requirements</i> .....	10
3. EDUCATIONAL PHILOSOPHY .....	10
<i>Educational Philosophy and Approach</i> .....	10
<i>Description of Instructional Methods</i> .....	11
<i>Research Base</i> .....	14
<i>Alignment with School Mission</i> .....	17
<i>Rationale and Likelihood of Improved Educational Performance</i> .....	17
4. CURRICULUM PLAN.....	18
<i>Core Academic Alignment with Sunshine State Standards</i> .....	18
<i>Reading Curriculum</i> .....	18
<i>Exceptional Students and Low-performing Student Curriculum Benefits</i> .....	19
<i>Evaluation</i> .....	20
<i>Curriculum Development Plan</i> .....	20
<i>Research Base for Curriculum Selection</i> .....	21
5. STUDENT PERFORMANCE, ASSESSMENT AND EVALUATION .....	26
<i>Educational Goals and Objectives</i> .....	26
<i>Promotion Standards</i> .....	28
<i>Secondary Students</i> .....	29
<i>Assessments Tools</i> .....	29
<i>Baseline Data</i> .....	30
<i>Assessment Results Shared with Students and Parents</i> .....	30
6. EXCEPTIONAL STUDENTS .....	31
<i>Procedures for Identifying Students with Special Needs</i> .....	31
<i>Individual Education Plans and 504 Plans</i> .....	32
<i>Staffing Plan</i> .....	35
<i>Evaluating Success for ESE Students</i> .....	36
<i>Gifted and Talented Students</i> .....	36
<i>Evaluating Success in Serving Gifted and Talented Students</i> .....	37
7. ENGLISH LANGUAGE LEARNERS .....	37
<i>Compliance with State and Federal Requirements</i> .....	37
<i>Procedures for Identifying Students &amp; Providing Support Services</i> .....	38
<i>Staffing Plan for ELL Program</i> .....	40
8. SCHOOL CLIMATE AND DISCIPLINE .....	40
<i>School Schedule</i> .....	40
<i>Philosophy Regarding Student Behavior</i> .....	40
<i>Code of Conduct</i> .....	41
<b>II. ORGANIZATIONAL PLAN</b> .....	<b>41</b>
9. GOVERNANCE .....	41
<i>Legal Structure</i> .....	41
<i>Organizational Chart</i> .....	44

	<i>Board of Directors</i> .....	45
10.	MANAGEMENT .....	47
	<i>Position List and Job Descriptions</i> .....	47
	Position: Principal .....	45
	Position: Vice Principal.....	46
	Position: Chief Financial Officer (CFO)/Office Manager .....	47
	Position: Director of Human Resources .....	47
	Position: Director of Curriculum .....	48
	Position: Director of Teacher Support & Development .....	49
	Position: Curriculum Coordinator .....	49
	Position: Reading Coach.....	50
	Position: School Nurse .....	51
	Position: School Psychologist.....	52
	Position: Social Worker .....	52
	Position: Master Teacher .....	53
	Position: Master Teacher – Special Education .....	54
	Position: Teacher .....	55
	Position: Paraprofessional/Instructional Aide .....	56
	<i>Selection and Evaluation of the School’s Principal</i> .....	57
	<i>Staffing Plan</i> .....	58
	<i>Recruitment, Selection, Development and Evaluation of Staff</i> .....	61
11.	EDUCATION SERVICE PROVIDERS .....	62
12.	EMPLOYMENT.....	62
	<i>Compensation Plan</i> .....	62
	<i>Personnel Policies and Procedures</i> .....	62
13.	PARENTS AND COMMUNITY PARTNERSHIPS .....	63
	<i>Parental Involvement &amp; Community Partnerships</i> .....	63
	<i>Dispute Resolution</i> .....	64
14.	STUDENT RECRUITMENT AND ENROLLMENT.....	65
	<i>Student Recruitment</i> .....	65
	<i>Racial/Ethnic Balance</i> .....	66
	<i>Enrollment Process</i> .....	66
	<i>Student-Parent-School Contract</i> .....	69
<b>III.</b>	<b>BUSINESS PLAN</b> .....	<b>72</b>
15.	FACILITIES .....	72
	<i>Proposed Site</i> .....	72
	<i>Compliance Plan</i> .....	73
	<i>Anticipated Costs</i> .....	73
	<i>Supplemental Funding Sources</i> .....	73
	<i>Facilities Back-up Plan</i> .....	74
16.	TRANSPORTATION AND FOOD SERVICE.....	74
	<i>Transportation Plan</i> .....	74
	<i>Food Services Plan</i> .....	74
17.	BUDGET.....	75
	<i>Operating &amp; Start-Up Budgets</i> .....	76
	<i>Fundraising Plan</i> .....	91
18.	FINANCIAL MANAGEMENT AND OVERSIGHT.....	92
	<i>Fiscal Management and Controls</i> .....	92
	<i>Storage of Student and Financial Records</i> .....	92
	<i>Insurance Coverage</i> .....	92
19.	ACTION PLAN .....	93

# Agency Snapshot

**Birth Haven** - Approximately **\$35,000** from just one plea letter  
**Audience/Funder: General public (faith community slant)**

Birth Haven did quite well with this donor letter. It resulted in close to **\$35,000** in donations from a pool of approximately 2,500 patrons, ... which was more than twice the amount that they typically secured through past Holiday pleas.

I began my work with Birth Haven in June of 2009. They are a good example of an organization that requires/required intensive services. Since joining them, I ... 1) conducted an extensive assessment of agency functioning/health and provided a detailed action plan of program elements requiring improvement or expansion, 2) led a Board member retreat to do preliminary strategic planning, 3) constructed questionnaires and analyzed (and contrasted) the completed satisfaction surveys of current residents, the Board of Trustees, staff, and community partners, 4) completed initial and subsequent prospect research with accompanying fiscal development plans, 5) prepared core materials and assisted with updating all agency materials for this 25-year old non-profit under transformation and new leadership, 6) drafted two donor plea letters, and 7) developed grant and other funding applications.

This is one organization that is doing better than ever before when it comes to donor plea letters and local fundraising events. Their new written materials and improved, consistent messaging is proving to enhance these outcomes at the local, grassroots level.

Their appeal with foundation and corporate funders is still under examination and several new programmatic elements are now being introduced to increase potential for success. Preliminary prospect research yielded **46 results**—which has grown to a target list of **75 potential grantmakers**, as of this writing. To date, here are the outcomes:

**Letters of Inquiry:** 17 (*5 denied, the others are pending response*)

**Full Grant Proposals:** 13 (*3 denied, 1 awarded, 1 pending next level review, the rest await response*)

At the end of May, we received notice of one funding award in the **amount of 10k, which is twice the amount they ever received from this particular funder**. The other pending application looks promising since additional information was requested by a foundation representative and we were told that our **\$15,000** request will be considered by their Trustees at the next scheduled review. This information suggests that we made it through the preliminary stage of the review process. (**Proposal excerpt attached as another sample.**)

**Total Consulting Costs for the Year: \$24,015**

Dear \_\_\_\_\_,

Do you believe in *miracles*?

**Birth Haven** does. We witness miracles every day through the healthy birth of babies, the substantially improved lives of their young mothers, and the generous contributions we continually receive from friends like you.

*In fact, without you, none of the miracles that take place at **Birth Haven** are possible.*

As everyone knows, the difficult economy has touched us all. Charitable organizations like Birth Haven have struggled alongside our neighbors who likewise needed to tighten their belts and do their best to get through these trying financial times. On behalf of Birth Haven, I sincerely hope that you and your loved ones are among the many who are expressing a sigh of economic relief.

The young women who come to Birth Haven know a thing or two about financial stress, though their experience has nothing to do with layoffs from a job or taking a hit on investments. Most have lived in abject poverty or grew up in extremely low-income households, and, when they come to us, they are homeless, and scared...and pregnant. Prospects for their futures seem dim due to lack of financial resources, education, and support. That, however, is BEFORE they come to Birth Haven.

***Birth Haven** is more than just a transitional housing program for homeless, pregnant women.*

***It is a place where life begins.***

Of course, babies have been born at Birth Haven for the last 25 years. That is the obvious answer. Yet, mothers whose futures once seemed uncertain also experience a birth—a *dawn of new hope, determination, self-confidence, and dreams.*

So, how is it that young, pregnant women can come to Birth Haven with what seems to be all odds stacked against them... and completely turn their lives around? Well, part of the answer is through donations that enable Birth Haven to provide housing, counseling support, education and Life Skills Training, parenting/baby care classes, case management coordination, and assistance with obtaining all necessary medical care prior to and after the baby's birth. The other answer is—**COURAGE.**

Making the choice to carry an unplanned pregnancy to term is, indeed, courageous. Especially when that means that you will do this alone, without available support of friends or family, and, most often, the baby's father.

Without **Birth Haven**, these young ladies would most certainly be alone. But they are not. We are here, and we will steadfastly continue to be the safe and supportive *haven* needed to help our brave residents navigate the multitude of challenges ahead. We will continue to help them discover their value in this world and unfold all the potential that lies within them.

As you spend time with your loved ones this Holiday season, we ask you to take a moment to look around you. Imagine living in a world where these other people did not exist. You were by yourself...and, with a baby on the way.

*What would that feel like?*

For those who do not have this sense of supportive family and community, **Birth Haven** fills a void. But, in order for us to do this—and do it well—we need your time, your talents... and your financial contribution.

*A donation of \$25, \$50, or \$100 is not just a contribution for today.  
It is an investment in someone's future. In fact, it deeply impacts upon TWO lives.*

I ask you to pull out your checkbook today and make a gift in whatever amount you can. Contributions of all sizes help, and there is no gift too small. (Or too large!) Each dollar goes a long, long way in creating daily *miracles* at Birth Haven!

As I close, I wish you and your family a peaceful Holiday season and a prosperous New Year! We hope you will remember Birth Haven during this celebratory time that is traditionally filled with so much joy, love, and HOPE.

Those three words—*joy, love, and HOPE*—truly reflect the *magic* of **Birth Haven** and the incredible work we do in support of these courageous young women who chose to alter their lives forever. They certainly didn't pick an easy path. But they *can* do it. And, we will help.

*Miracles DO happen.*

Sincerely,

Kate Yaskovic  
Executive Director

# Birth Haven

## Mission Statement

Birth Haven is an independent, non-sectarian, non-profit organization that provides shelter, support, and education for homeless, pregnant women and girls. In a safe, healthy, and nurturing environment, Birth Haven fosters brighter futures by helping residents attain critical tools necessary to achieve greater self-sufficiency.

## Program Description

Established in 1985, Birth Haven supports pregnant girls and young women from throughout the State of New Jersey and the surrounding Tri-State area. Located in Newton, New Jersey, our transitional living facility can accommodate 9 individuals and their newborns at any given time.

Birth Haven provides a safe and nurturing environment in which disadvantaged young mothers not only carry their unexpected pregnancies to term, but also learn the skills necessary to achieve greater self-sufficiency. Basic needs, such as short-term housing, a protective refuge from currently experienced or elevated risk of domestic violence, food and proper nutrition, access to all necessary medical care to ensure the most positive health outcomes for mother and baby, and counseling services are the first tier of critical support. Equally important are efforts that help the resident leave the program in the greatest position of strength, equipped to adequately care for both herself and the needs of her newborn child. This is achieved through our *Life Skills Program*, which is conducted Monday through Friday in collaboration with a number of local partner agencies, and a strong emphasis on attainment of personal educational goals.

*Life Skills* training module topics include, but are not limited to:

- Parenting Skills
- Baby Basics
- Labor and Delivery
- Adoption Options
- Nutrition and Cooking
- Smoking Cessation
- Budgeting and Banking
- CPR Certification
- Home Safety and Maintenance
- Healthy Relationships
- Child Abuse Prevention
- Postpartum Depression/Anxiety Awareness
- Signs of Domestic Violence
- Job Readiness
- Affordable Housing

The girls and young women who come to Birth Haven are diverse in many ways, while, at the same time, there are some distinct commonalities. Almost all of those who walk through our doors are presently or persistently homeless, come from extremely low-income families or ones that fall below the poverty level, have achieved only a limited education thus far, and are likely to raise their baby themselves if they do not opt for adoption placement. All of them are scared and virtually alone when they make the courageous

decision to have their baby, despite the personal challenges this presents for them. That is...until they come to us. Once they arrive at Birth Haven, we support them every step of the way.

Outside of the basic human needs met through our program, future success demands attention to long-range considerations. Pathways out of poverty, and breaking the continuous cycles that can plague some families for generations, deeply centers on educational attainment—which, naturally, affects future job and, in turn, economic prospects. This is especially true in today’s economy and heightened global competition. Focus on education benefits the mother, of course, but it also dramatically impacts upon the life and long-term well-being of the child. As a result, Birth Haven is committed to creating solutions to the barriers that many of our residents faced well before coming to us, as well as the hurdles they will encounter as they leave. Birth Haven does this every day—offering targeted answers to individualized needs, an educational forum to gain practical tools for living, ongoing emotional support and encouragement, and a multitude of important learning opportunities that go far beyond provision of basic transitional housing.

Most residents live at Birth Haven for approximately 4 months, leaving 6-8 weeks after the baby’s birth. Extended stays are occasionally granted when it is in the best interest of the mother and infant. Since opening our doors 25 years ago, more than 500 women and their babies have been served. In 2009 alone, our program supported 34 residents and 13 newborns. Of the 13 babies born at Birth Haven last year, only two were adopted.

## Our Funding Request

The girls and young women who come to Birth Haven have a long road ahead, especially in light of the fact that their experiences in life, so far, categorize most of them as extremely disadvantaged. Not only did most grow up—and continue to live—in poverty, but it is fair to say that they have many odds stacked against them in almost all areas of life functioning.

As they have made the very brave decision to carry their pregnancy to term, and many of them choosing to raise their baby themselves, the outlook for life may feel daunting. They have no money, scarce support systems, and devastatingly low educational achievement under their belts. In the short time that they are at Birth Haven, they need to learn how to care for a baby and themselves, as well as lay groundwork for a future with highest potential for success. Birth Haven places deep emphasis on meeting individualized educational goals because it is the single greatest determinant in the future well-being of both mother and child.

In 2009, Birth Haven served a total of 34 women. During this time:

- 2 were enrolled at Newton High School
- 13 were working on their GED (only one resident successfully completed the exam)
- 2 were enrolled in college

Of the statistics listed above, perhaps the most important need is evident when showing how many residents were working on their GEDs versus how many actually passed the test. Given the fact that so many are functioning well below grade level for their age, Birth Haven must increase the supports needed to help reduce these significant learning gaps. Computers are needed by all residents in order to meet

many, many needs—but the discouraged learners who cannot obtain their GED quickly require more intensive interventions. Components of our project will do just that and give them daily access to systems that can help them meet their goals in the shortest amount of time possible.

Birth Haven recently submitted a grant application to fund the development of an onsite computer center. It is anticipated that the approval of that request is likely given the fact that the grantmaker typically does support our organization each year. The total project budget, however, will not be fully supported through that grant award. It will only cover the costs of the computer equipment, workstation furnishings, and IT consultant services to accommodate networking and other configuration needs.

An important component to our latest effort is the addition of educational software systems that can aid our residents in GED and SAT preparation, as well as help struggling learners advance their grade level proficiency in all core academic subjects. In particular, Birth Haven would like to incorporate Pearson's *NovaNET* into our program offerings. This software system is specifically designed for “alternative” learners with academic proficiency levels of 6<sup>th</sup>-12<sup>th</sup> grade. The educational tool is age-appropriate for older learners as well, focusing on academic skills versus developmental age, which is important since animations geared toward young learners are not acceptable for a resident in her late teens or early 20s.

*NovaNET* provides individualized learning modules at the pace required by the non-traditional student. The computerized tool offers detailed assessments and report generation capabilities as well, and teachers can assist and instruct a student from a remote location. Because Birth Haven does not have educators on staff, we will need to locate retired or active teachers as volunteers to help make best use of this software. Conversely, the computer itself guides most of the learning process through its ability to detect skill deficits and automatically introduce lessons to address them.

We have requested a product quote from Pearson, who has exceptional digital learning systems which are, admittedly, costly. Four licenses, based on web portal use rather than limited users each year, would cost \$16,592.00 for a three-year contract. The estimate also includes staff/volunteer training and set-up fees. This is the most cost effective package since we will receive one year free by signing on for the three-year deal. If we were to only purchase one year's service, it would run more than \$11,300 for that year. We seek support from the Dr. Scholl Foundation for half of the three-year contract in the amount of **\$8,300**.

We additionally request support for our *Life Skills Program* in the amount of **\$6,000** to fund trainer/teacher fees and purchase materials to begin our own in-house parenting class. The current parenting program attended by our residents at another agency is not precise enough to meet the full needs of our expectant and new mothers.

At present, we are investigating potential curriculum options and materials needs. Upon early exploration of available duplicative programs, it appears as though we will end up utilizing some effective components of existing programs, including DVDs, session workbooks, and hand-outs. Using any of these pre-existing, best practice curricula would require some staff training expenses. More than likely, Birth Haven will need to create a unique and comprehensive training system that incorporates many of these different resources and the purchase of multiple hands-on tools. This may additionally include expensive computerized infant dolls that can digitally detect improper baby care techniques, such as inadequate neck support, and offer real-life simulation of a newborn's response to care.

Lastly, we seek **\$700** to help defray our grant writing, fundraising plea, and organizational development costs. Our combined request from the Dr. Scholl Foundation, which includes these three needs, is **\$15,000**.

# Agency Snapshot

## **Club Horizon - \$40,000**

competitive GlaxoSmithKline **IMPACT** Award

**Audience/Funder: Corporate giving**

This application resulted in this organization winning a highly competitive, **\$40,000 IMPACT Award** from GlaxoSmithKline. (This is not a grant competition. Ten (10) organizations in Philadelphia and ten (10) from North Carolina are selected each year based on their current programming in healthcare and access to care.) The agency was a significant underdog in this opportunity and, **until working with me, they never received more than \$2,500 from any one funder** (and had a very limited history with grants at any level)!

In May, we learned that they were also approved for a **\$5,000 grant award**. So far so good! Two positive responses out of eight applications. No denials yet. The rest are pending funder decision notifications. (I also crafted two donor plea letters for them, of which I have not heard outcomes.

Like other organizations, Club Horizon had fairly substantial work to do on core materials, determining best arguments, and developing accurate budget projections. They are also introducing a new program offering which meant that we had some details to work through. Additionally, the recently submitted applications were for several different funding types and programs, which, as has been stated throughout this prospectus, requires variations on core documents.

Further, despite this organization serving a rural area, which creates challenges in locating funders, ... I identified **54 viable grantmaker** opportunities through prospect research. This includes both local and national resources.

**Total Consulting Costs for One Year: \$17,075**

**Last fiscal year support - actual or estimated**

	Amount	% of Budget
Government	\$ 60,000.00	7.5%
Fees/earned income (Medicaid)	\$ 717,043.46	89 %
Individual donors	\$ 21,902.46	3 %
Foundations * & Corporations*	\$ 0	0 %
Other (specify) Special event	\$ 4,028.25	.5 %
<b>Totals</b>	<b>\$ 802,974.17</b>	<b>100 %</b>

\* - provide list of top Foundation and Corporate support: **New, aggressive grants program started in November 2009. (Minor foundation and corporate giving amounts are included in general donor tallies for last year.)**

**Staff Size:** (Please attach an organization chart of paid staff titles; names not required.)

Full-time	Part-time	Volunteer
14	4 (upon expansion)	5

## Organizational Narrative

The individual (e.g., Executive Director, Development Director, President, or CFO) who completes the application should note that there is a word maximum for each answer and a minimum font size of 11. The boxes will expand as you type.

**1. PROGRAMS:** List your organization’s three current key programs. How have the programs met client needs? How long have the programs been in operation? Where possible, quantify the impact and provide evidence of any qualitative changes as a result of your program services.

Total max word count 700

**Program 1:** Club Horizon’s **Clubhouse** (psychosocial rehabilitation day program) was established in 2004. The program operates during regular business hours, five days a week, with additional evening and weekend social activities scheduled as well. Within a framework of mutual acceptance, respect, and support, persons with severe and persistent mental illness work at their own pace to gain or regain the confidence and skills necessary to lead vocationally productive and socially satisfying lives.

Centering on the concept of a “work-ordered day,” each “member” chooses to participate in one of several work units to accomplish the daily functions of the Clubhouse. In collaboration with staff, individuals answer the phone or make supportive “check in” calls to members who have been absent for a while, perform a wide array of important clerical duties, welcome guests and new members, prepare and serve lunch, manage the snack bar, and participate in job training. Work is fundamental to each member’s daily routine, making transition into paid employment in the community the next natural step in meeting individualized vocational goals. Over 200 members have participated in pre-vocational programming over the last five years.

Under the Clubhouse umbrella, Club Horizon offers independent housing support for (currently) 8 members (although expansion is underway), assistance in attaining personal educational goals, and help with other life needs, such as food, clothing, transportation, physical wellness, and filing applications for entitlement benefits. The organization also conducts a Transitional Employment Program in which Clubhouse staff partner with community employers to secure entry level jobs for members, with training and ongoing support provided as required by the member and/or the employer. Transitional Employment leads to Supported Employment, followed by Independent Employment.

This comprehensive variation of the psychosocial rehabilitation (PSR) model promotes recovery, full community integration, and improved quality of life for persons who have mental health conditions that seriously impair functioning. Clubhouse PSR services directly address the high risks that many persons with serious mental illness experience with regard to frequent hospitalizations, high utilization of emergency room services, low levels of functioning in the community, social isolation, persistent homelessness, inappropriate incarceration, and disproportionate unemployment rates.

Clubhouse programs are known to prevent repeated hospitalizations for people who need coordinated, and, often, elevated supports in order to function well in the community. As an example, national statistics show that re-hospitalization rates for clubhouse members is 14%, compared with 44% for those not in a clubhouse setting. Club Horizon has maintained member re-hospitalization rates of less than 10% since provision of Clubhouse services began.

**Program 2:** Since community-based programs are never “one size fits all” for any individual, Club Horizon began providing **Community Support Services** (CSS) in 2006. CSS involves a variety of interventions which are performed outside the Clubhouse, including psycho-education, symptom and medication monitoring, improving self-management of symptoms, attention to medical care needs and assistance in obtaining care, teaching patient self-advocacy skills, and interpersonal skills training. Designed to assist the consumer in acquiring the recovery skills necessary to live successfully in the community, CSS provides customized services coordination across all levels of care and functioning. CSS currently supports 55 persons.

**Program 3:** Club Horizon is currently developing a new **Outpatient Services** program, which will provide in-house psychiatry and clinical therapy services. As a rural agency located in a *Health Professional Shortage Area* (HPSA) in the mental health category, this is an urgently needed resource for both our current members and other persons with severe mental illness in the region.

The program will be staffed with a part-time psychiatrist, as well as one full-time and several part-time licensed clinical social workers. As of this writing, the full-time LCSW is already on staff and Club Horizon is working to recruit its psychiatrist.

Our goal is to serve a minimum of 150 persons by the end of the first year and to reach a patient/client roster of 300 persons by the end of year three. At full capacity, Outpatient Services will be completely self-sufficient through Medicaid and other insurance reimbursements. Introduction of this new program will substantially increase numbers served by Club Horizon and it is likely that Clubhouse membership will also grow as a result of this new service component.

**2. COMMUNITY FOCUS: How do your key programs target people in need? Who are they and how is that need assessed?**

Total max word count 300

Club Horizon serves adults in Wake County, North Carolina who are diagnosed with serious mental illnesses such as Schizophrenia, Bi-Polar Disorder, and Major Depression. The majority of referrals are received from local health and mental health providers, including state psychiatric facilities and other hospitals, psychiatrists, therapists, physicians, and case managers. Also, Club Horizon frequently gets direct inquiries from families, friends, and other members of the community.

Referrals are reviewed by Club Horizon staff to determine if: 1) the individual meets diagnostic criteria for services, 2) the potential member is willing to partner with our program to reach their recovery goals, and 3) the person truly desires support. Diagnostic criterion adheres to the North Carolina service definition and International Center for Clubhouse Development (ICCD) standards. If the prospective member meets eligibility standards, Club Horizon will only deny membership if a person is a potential harm to themselves or others. Further, the individual must be stabilized and ready for rehabilitation.

Once an individual is in the program, needs are assessed ongoingly. Through individualized goal planning, direct observation and discussions, satisfaction survey results, record keeping (such as member attendance), and outcomes of specific programming, Club Horizon becomes acutely aware of member needs and indications of possible crisis. This is critical since deficits in one or more life areas can impact on mental health stabilization and recovery. Therefore, interventions are immediate when signs of difficulty are detected, and could involve any number of resolutions and support approaches.

Club Horizon's programming provides a comprehensive continuum of care. The various program elements work collaboratively to assess and address all needs that impact on mental health outcomes and an individual's optimal functioning. With this population, needs must be constantly re-evaluated due to the fact that health and mental health status is likely to fluctuate.

**3. ACHIEVEMENTS/OUTCOMES: What criteria are used to evaluate the organization's community health impact and success? Describe any systems you have for planning, monitoring, and evaluating your work on a regular basis. What are the achievements/outcomes? Include any data/statistics. Note if evaluations are independent, risk adjusted, or statistically significant.**

Total max word count 300

**Criteria:**

1. Club Horizon decreases taxpayer/governmental spending through the provision of effective community-based services that increase member functioning and reduce the number of hospital stays/emergency mental health crisis interventions for persons with severe and persistent mental illness in rural Wake County.
2. Club Horizon provides community services that facilitate care with primary care providers, dentists, substance abuse programs, and therapists to decrease the use of local emergency rooms for conditions which may be effectively treated on an outpatient basis.
3. Club Horizon improves overall health of membership through direct services, community

linkages, wellness management, and health education.

**Systems:**

1. Club Horizon follows ICCD and CARF “best practice” standards, undergoing certification reviews every 3 years.
2. Quarterly Quality Assurance reviews (independent/internal) analyze data, documentation, and outcomes, in addition to program strengths and needs. This includes detailed records on hospitalizations and utilization of crisis response systems, community linkages (healthcare and other), member retention rates, numbers served each month and services received, demographics, homelessness, medication compliance, employment statistics, incarcerations, satisfaction surveys, etc.
3. Quarterly improvement project reports are provided to the local management entity which identifies improvement needs and intended corrective action.
4. Weekly program meetings with members/staff to identify program successes and improvement needs. Staff also meets to discuss needs of individual members who may be experiencing difficulty and devise strategies for interventions when needed.

**Outcomes:**

1. 130 members served in the last 12 months. (Expansions underway)
2. Club Horizon has a 9.6% re-hospitalization rate. Club Horizon services cost \$84 a day vs. \$835.00 per day for psychiatric hospitalization. 53 of 63 members surveyed revealed a total of 250 hospitalizations prior to attending Club Horizon. After admission to our program, that survey group reported only 24 psychiatric hospitalizations. 90% of members who have been re-hospitalized have experienced shorter hospital stays.
3. Club Horizon maintains CARF and ICCD certifications.

**4. PARTNERSHIPS: Has your organization developed any substantial, collaborative partnerships with other organizations? Describe how the partnerships help to meet your objectives? (This is not asking another organization to distribute your literature, etc.)**

Total max word count 300

Due to limited space, the following list is not exhaustive:

1. The Wake County Local Management entity provides funding and referrals for our program. Both increase our impact and outreach.
2. The National Alliance for the Mentally Ill (NAMI)/Wake County enhances our agency programming with regard to planning and implementation of social activities. It is also one source of new member referrals. Club Horizon reciprocates by providing trainings for NAMI’s Crisis Intervention Teams which prepare police officers to properly recognize the symptoms of mental illness and respond appropriately/effectively when called to assist in a crisis. Our involvement helps protect the rights, dignity, safety, and increased community acceptance of persons with severe mental illness.

3. We currently partner with CASA in relationship to 8 supported living apartments for persons with mental illness. CASA owns and manages the properties, while Club Horizon provides the essential support services necessary to ensure that a member can continue to live successfully in the community. Such stability is one factor central to mental health recovery.
4. Club Horizon works with 9 members of the deaf community in collaboration with the Wake County Human Services Deaf Team. (We are the only PSR program in the county that serves deaf consumers with personnel on staff who are fluent in American Sign Language.) Wake County Human Services also provides assistance to Club Horizon in its effective support of Spanish-speaking members. Club Horizon routinely bridges gaps in services, especially for more difficult-to-serve populations who often go without proper support and services.
5. NC State University volunteers offer programming related to physical wellness. NC Mental Health Consumers provides regular workshops on empowerment and self-advocacy. We also utilize MSW and (soon) BSW student interns from NC State. These partnerships enhance our comprehensive approach to mental health recovery and reaching/maintaining optimal functioning.

**5. Please provide additional information which would make a compelling case for your application. Do not repeat information already given.**

Total max word count 300

Club Horizon programming combines, under one organizational structure, the three interdependent modalities for successful support of persons with serious mental illness—holistic approaches, professional medication management, and psychosocial rehabilitation. Services are provided regardless of ability to pay or availability of Medicaid/other insurance reimbursements.

**CSS** staff coordinates services with primary care physicians, as well as specialists such as gynecologists, neurologists, and others. Every year, Club Horizon works with the local health department to increase member awareness of safe sexual behavior, nutrition, and general physical health. Our **Clubhouse's** formalized Wellness program includes weekly groups focused on health education and physical wellness, exercise, smoking cessation, reducing mental health relapse, symptom management, effective medication usage, and coping with the challenges of living with mental illness.

As part of relapse prevention, Club Horizon intervenes prior to full-blow crisis by linking consumers with psychiatrists for necessary medication adjustments, ensuring that medication is administered correctly, and making certain that the psychiatrist is aware of any issues that may be exacerbating psychiatric symptoms. Addition of our new **Outpatient Services** program will allow members to receive these services in-house, should they choose, while also offering one more urgently needed resource for other members of the community who require psychiatric care. Introducing this new service component is a prime example of Club Horizon's commitment to the needs of persons with mental illness in Wake County, and our unwavering responsiveness to the ever-changing shifts in funding, mental health reform, and available community resources.

Club Horizon does it all. Operating under a "do what it takes" philosophy, programming centers on all aspects of successful living — mental and physical health (including access to care), work, education, housing, social and life skills development, empowerment/self-advocacy, and...above all...instilling a deep and rightful sense of *belonging* in society. *That... is IMPACT.*

# Creative Edge Consulting

443-545-5863

**“The difference  
between what we  
do and what we are  
capable of doing  
would suffice to  
solve most of the  
world’s problems.”**

**-Mahatma Gandhi**

