

UNITED WAY OF NORTHEAST FLORIDA, INC. – United Way 2-1-1 Program

FY 2024-2025 City Grant Proposal Term Sheet

Grant Recipient: United Way of Northeast Florida, Inc. (“Recipient” or “United Way”)

Program Name: United Way 2-1-1 (the “Program”)

City Funding Request: \$150,000.00

Contract/Grant Term: October 1, 2024– September 30, 2025

Any substantial change to this FY 2024-2025 City Grant Proposal Term Sheet (the “Term Sheet”) or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

PROGRAM OVERVIEW:

United Way 2-1-1 is a confidential information and referral helpline that includes a crisis and suicide prevention hotline. United Way 2-1-1 connects people of all ages and from all communities to the essential health and human services they need, 24 hours a day, seven days a week. Community resource specialists identify and connect people in need to available resources while demonstrating respect and compassion. Specialists also de-escalate stressful situations and serve as the first point of contact for crisis calls including callers demonstrating suicidal ideology. Specialists conduct follow up communications, intake for specialized programs or services, outbound calls, basic database maintenance and community outreach. The funding will be applied toward call center programmatic expenses during FY 2024 – 2025 as outlined below.

PROGRAM SCOPE OF WORK AND DELIVERABLES:

In 2023, United Way 2-1-1 handled a total of 66,969 calls from Duval County residents. Residents experiencing hardship or a difficult or dangerous situation were connected to regional community resources resulting in more than 55,767 referrals to avoid further deterioration of their health, safety, or welfare. Some of the calls to United Way 2-1-1 were to schedule appointments for the United Way RealSense Tax program.

The bulk of our activities center on information and referral however additional services provided include **veteran care coordination, crisis intervention, and disaster recovery and preparation.** Section 408.918, Florida Statutes, requires accreditation from the Alliance of Information and Referral Services (AIRS) in order to operate as a recognized 2-1-1. The United Way of Northeast Florida 2-1-1 obtained full reaccreditation by AIRS in June of 2021 for a period of five years. The information and referral services are **offered at no cost** to residents of Duval County as well as eight additional northeast Florida counties. However, the vast majority (86%) of calls, emails and texts requesting assistance from United Way 2-1-1 are from Duval County residents.

Veteran care coordination is available to all area veterans and their families at no cost through United Way 2-1-1. Approximately 90% of care coordination cases are from Duval County residents and they are connected to federal, state, and local organizations. Care coordination includes identifying resources, advocacy, follow-up, and peer counseling to ensure veterans avail themselves to all benefits during times of need. The wide array of veteran service offerings can be confusing and dedicated veteran care coordinators provide the vital link to those services.

As an **accredited American Association of Suicidology (AAS)** and associate agency of the National Lifeline (988), United Way 2-1-1 specialists provide crisis and suicide intervention services to all residents. Suicide and crisis calls are prioritized ahead of all information and referral inquiries. A dedicated and highly-trained group of crisis specialists provide immediate assessment of suicidal and homicidal risk, attempt de-escalation and provide referrals to appropriate area mental health resources. United Way 2-1-1 serves as 1 of 13 regional National Suicide Prevention Lifeline (988) contact centers in the state of Florida. We are working closely with regional mental

health providers, law enforcement (911) and health institutions to use the recent roll-out of 9-8-8 as an opportunity to build out the ideal system of response to crisis in our region. This 9-8-8 roll-out is not just about handling more crisis calls, but developing a process to ensure these calls are routed properly to community agencies for either follow-up support services or law enforcement intervention when necessary.

United Way 2-1-1 plays a pivotal role during manmade and natural disasters in association and partnership with the Jacksonville Fire and Rescue Department, the City's Emergency Operations Center (EOC) and as member of the Duval Community Organizations Active during Disasters (COAD). The 2-1-1 contact center provides connection to disaster agencies, information to the EOC and COAD, and serves as the community database for **disaster recovery services and preparation information** for the community. The First Coast Relief Fund (FCRF) played a critical role in providing immediate response and support to victims of Hurricane's Matthew and Irma, and most recently during the COVID pandemic. United Way 2-1-1 served as the gateway for many Duval residents to access resources and support that were established through the FCRF.

PROGRAM COSTS/PAYMENT TERMS: *United Way will be reimbursed on expenses for up to 4 Call Center Specialists and partial funding for the 2-1-1 Director.*

PROGRAM IMPACT & REPORTING:

The top three needs presented by callers did not change year over year (rent & mortgage assistance, utility assistance and food assistance). The top 16 zip codes where calls were placed from all originated from Duval County. Without United Way 2-1-1, these calls and callers would likely have relied upon 630-CITY for support and resources.

United Way 2-1-1 meets or exceeds all accreditation requirements to include quality assurance, training and supervision of staff and is confident in its ability to continue its process and program improvements. Improvements in the past year have included the launch of customer feedback survey technology which is offered to all callers not identified as suicidal. From May 2022 to May 2023, a total of 2,824 callers completed the survey and rated 2-1-1 Overall with an average score of 4.1 out of 5.0 scale. They also rated the listening ability and courtesy of our Specialists as 4.5 and 4.4 respectively out of a 5.0 scale. Additionally, technological improvements include a fully integrated SMS texting platform that allows for two-way communication, push notifications, and the sharing of information based on keywords.

In response to the significant increase in call volume, as well as our recent pivot back to handling all 211 and 988 calls 24/7, United Way 2-1-1 needs to hire additional staff in order to maintain adequate and expected response and wait times for callers. For the past several years, we have outsourced our calls received after hours (7:00 p.m. to 8:00 a.m.) on weekdays, weekends and holidays to our sister 2-1-1 in Miami. While we are excited to handle 100% of our calls made in the region, we need to increase our capacity and provide additional support to help account for the expanded hours of operation and the narrow margins we are currently operating under. Last year, we expanded the number of I&R Specialists from 11 to 13 to accommodate these deficits.

Through our Ride United initiative supported through the 2-1-1 call center, we have been able to provide free transportation for Duval County households that were without direct access to health, food and employment services through our national partnerships with Lyft. During the last year, 2-1-1 provided just under 4,000 rides to local residents to access medical appointments, job interviews, start new employment or to pick up food from local pantries or groceries, and we received additional funding from Baptist Health and Mayo Clinic Florida to expand the number of rides we can provide in 2024-25.

We will report the number of calls answered from Duval County residents by zip code. We will report the top 5 needs/reasons callers reached out for help for all Duval residents, and we will report the number of referrals provided to address the needs of Duval residents. We will monitor and report wait times of callers during peak volume times and on average.

Anticipated outcomes:

Calls answered from Duval residents: 67,000

Referrals provided to Duval residents: 56,000

ADDITIONAL GRANT REQUIREMENTS AND CONDITIONS:

Recipient's expenditure of City funds for the Program and the provision of services shall be subject to Chapter 118, Parts 1 – 5 of the *Jacksonville Ordinance Code*, and the terms and conditions of any contract entered into between the City and Recipient. Recipient shall use the City funds for the Program in accordance with the City Council approved Term Sheet and Program budget. The City's Grant Administrator may amend this Term Sheet or the approved Program budget consistent with the Program's needs, provided that any substantial change to this Term Sheet or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

FY 2025 City Grant - Complete Program Budget Detail

Lead Agency:
 United Way of Northeast Florida, Inc.
 Program Name:
 United Way 2-1-1

Agency Fiscal Year:
 July 1, 2024 to June 30, 2025

Categories and Line Items	Prior Year Prg Funding FY 2022-2023	Current Year Prg Budget FY 2023-2024	Total Est. Cost of Program FY 2024-2025	BUDGET				
				Agency Provided Funding	All Other Program Revenues	City of Jacksonville (City Grant)	Federal/ State & Other Funding	Private Foundation Funding
I. Employee Compensation								
Personnel - 01201 (list Job Title or Positions)								
1 Call Center Specialists (12)	\$375,080.00	\$375,080.00	\$474,240.00	\$133,981.51	\$0.00	\$120,000.00	\$220,258.49	\$0.00
2 2-1-1 Overtime Expenses	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
3 Temporary Staff			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 211 Director	\$13,000.00	\$13,000.00	\$104,000.00	\$74,000.00	\$0.00	\$30,000.00	\$0.00	\$0.00
5 2-1-1 Database Resource Manager	\$55,000.00	\$55,000.00	\$57,500.00	\$57,500.00	\$0.00	\$0.00	\$0.00	\$0.00
6 Operations Supervisor	\$66,000.00	\$66,000.00	\$66,000.00	\$66,000.00	\$0.00	\$0.00	\$0.00	\$0.00
7 Outreach Specialist	\$40,102.00	\$40,102.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8 Team Leads (2)	\$82,056.00	\$82,056.00	\$85,500.00	\$85,500.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Employee Compensation	\$636,238.00	\$636,238.00	\$792,240.00	\$421,981.51	\$0.00	\$150,000.00	\$220,258.49	\$0.00
Fringe Benefits								
Payroll Taxes - FICA & Med Tax - 02101	\$54,272.16	\$53,236.22	\$60,606.36	\$60,606.36	\$0.00	\$0.00	\$0.00	\$0.00
Health Insurance - 02304	\$100,000.00	\$98,091.22	\$204,000.00	\$204,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Retirement - 02201	\$21,283.20	\$20,876.95	\$23,767.20	\$23,767.20	\$0.00	\$0.00	\$0.00	\$0.00
Dental - 02301	\$7,500.00	\$7,356.84	\$4,760.00	\$4,760.00	\$0.00	\$0.00	\$0.00	\$0.00
Life Insurance - 02303	\$10,000.00	\$9,809.12	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Workers Compensation - 02401	\$5,675.52	\$5,567.19	\$2,785.00	\$2,785.00	\$0.00	\$0.00	\$0.00	\$0.00
Unemployment Taxes - 02501	\$5,680.00	\$5,571.58	\$13,468.08	\$13,468.08	\$0.00	\$0.00	\$0.00	\$0.00
Other Benefits - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Taxes and Benefits	\$204,410.88	\$200,509.13	\$314,386.64	\$314,386.64	\$0.00	\$0.00	\$0.00	\$0.00
Total Employee Compensation	\$840,648.88	\$836,747.13	\$1,106,626.64	\$736,368.15	\$0.00	\$150,000.00	\$220,258.49	\$0.00
II. Operating Expenses								
Occupancy Expenses								
Rent - Occupancy -04408	\$48,000.00	\$153,700.00	\$50,000.00	\$50,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Telephone - 04181	\$225,000.00	\$223,000.00	\$200,000.00	\$200,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Utilities - 04301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Maintenance and Repairs - 04603	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Insurance Property & General Liability - 04502	\$9,600.00	\$9,600.00	\$9,600.00	\$9,600.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - Database	\$40,500.00	\$41,000.00	\$41,000.00	\$41,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Office Expenses								
Office and Other Supplies - 05101	\$1,500.00	\$2,000.00	\$2,000.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Postage - 04101	\$750.00	\$750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Printing and Advertising - 04801	\$50,000.00	\$50,000.00	\$50,000.00	\$50,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Publications - 05216	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Staff Training - 05401	\$35,000.00	\$35,000.00	\$15,000.00	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Directors & Officers - Insurance - 04501	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Professional Fees & Services (not audit) - 034	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Background Screening - 04938	\$1,500.00	\$0.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - Equipment under \$1,000 - 06403	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Expenses								
Local Mileage - 04021	\$1,500.00	\$3,000.00	\$1,500.00	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00
Parking & Tools - 04028	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Equipment Expenses								
Rental & Leases - Equipment - 04402	\$37,694.00	\$38,000.00	\$38,000.00	\$38,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Vehicle Fuel and Maintenance - 04216	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Vehicle Insurance -04502	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Service Point Database & CRM)	\$24,000.00	\$24,000.00	\$24,000.00	\$24,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Client Expenses - 08301								
Client Rent	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Food	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Medical	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Educational	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Personal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Other (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Other (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Operating Expenses	\$485,044.00	\$590,050.00	\$442,100.00	\$442,100.00	\$0.00	\$0.00	\$0.00	\$0.00
III. Operating Capital Outlay (OVER \$1,000)								
Machinery & Equipment - 06402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computers & Software - 06427	\$7,500.00	\$27,000.00	\$12,000.00	\$12,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Capital Outlay	\$7,500.00	\$27,000.00	\$12,000.00	\$12,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Expenses Total	\$1,333,192.88	\$1,453,797.13	\$1,560,726.64	\$1,190,468.15	\$0.00	\$150,000.00	\$220,258.49	\$0.00
Percent of Budget	-	-	100.0%	76.3%	0.0%	9.6%	14.1%	0.0%

Last Modified: 02/11/2020

All City Grant items listed must be included in the narrative section of the budget.

**Budget Narrative for Selected Items of Cost
FY 2025 City Grant Application
Program Budget Narrative (Max. 2 Pages)
Proposed Funding Period: FY 2024-2025
COJ Funding Only**

Agency: United Way of Northeast Florida, Inc.

Program Name: United Way 2-1-1

EXPENSES: Please provide narrative description for all categories listed below for which you are seeking **City Funding Only**.

We have included those required elements in the spaces below. See instructions when listing personnel expenses.

Please feel free to add additional lines as necessary to provide explanations using the line insert feature.

I. Employee Compensation - (not related to costs of the office of the governor of a state or the chief executive of a political subdivision)

Salary & Wages to include OT/Bonus, and shift differential compensation

Information & Referral Specialists	\$120,000.00	76% funding of 4 Crisis (Call Center) Specialists
2-1-1 Director	\$30,000.00	29% of Salary
Total	\$150,000.00	

BUDGET NARRATIVE

AGAPE COMMUNITY HEALTH CENTER, INC.

FY 2024-2025 City Grant Proposal Term Sheet

Grant Recipient: Agape Community Health Center, Inc., a Florida not-for-profit corporation (“Recipient”)

Program Name: Integrated and Accessible Primary & Behavioral Health Care Services (the “Program”)

City Funding Requests: \$126,972

Contract/Grant Term: October 1, 2024– September 30, 2025

Any substantial change to this FY 2024-2025 City Grant Proposal Term Sheet (the “Term Sheet”) or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

PROGRAM OVERVIEW: Agape’s integrated and accessible primary and behavioral health care services program, (hereafter, the Program), serves Duval County residents. The Program is offered in six zip codes (32204, 32208, 32216, 32218, 32244, & 32277), where the patient population is demographically diverse and has undiagnosed and uncontrolled hypertension and diabetes. The Program’s goals and objectives are health promotion and prevention of strokes and heart attacks. This work is a priority because a higher percentage of Duval County residents (11.9%) compared to Florida residents (9.1%) have been told they are pre-diabetic.¹ Moreover, of Florida’s 67 counties, Duval ranks #46 in health outcomes.² Therefore, the Program will assist county residents by (1) providing services to income eligible patients without regard to the ability to pay, (2) providing universal screening, standardized assessments, case management, brief psychotherapy, social services linkages, joint care planning, frequent healthcare team plan of care consultations, patient health outcomes monitoring, and point of service/care health education, (3) providing coordinated, co-located, and integrated behavioral health and primary care services using a single, electronic health record plan of care. In FY 24/25, the City’s direct appropriation funding will be paid to the State.

PROGRAM SCOPE OF WORK AND DELIVERABLES: Adults refer to the Program’s growing census. In FY 24/25 the objectives will be to *increase the proportion of adults (IPOA)* who achieve hypertension control or blood glucose control, and of adults who are overweight/obese, provide a diagnosis of pre-diabetes, if indicated. The Program’s activities will include scheduling/rescheduling appointments, organizing patient flows, completing comprehensive assessments, (biomedical, social, emotional, and behavioral health histories), using team-based care, developing tailored treatment plans, documenting care in an electronic health record, engaging patients in treatment involvement, and doing post-treatment follow-ups. Deliverables include reduce waiting time after check-in, identification of disease risk and protective factors, creating measurable and quantifiable care plans objectives, and development and display of key Program performance indicators. The timeline for these deliverables will be from the point of service encounter to six months after receipt of funding.

PROGRAM COSTS/PAYMENT TERMS: The cost to operate the Program for the Low-Income Pool (LIP) appears in Table 1 below. The City’s intergovernmental transfer will go to the State. All other funding sources and additional City of Jacksonville funding appear below.

¹ [County Health Profile \(flhealthcharts.com\)](https://flhealthcharts.com)

² [Florida | County Health Rankings & Roadmaps](#)

Table 1: Other Funding Sources Applied for or Contributed to Agape’s Primary Care Services Program

FUNDING TYPE	COJ MATCH	MATCH DESCRIPTION	ACHA STATE	TOTAL FUNDING
LIP	\$123,028	Initial Local Intergovernmental Transfer	\$164,219	\$287,247
COJ	\$126,972	City Contribution Uncompensated Care	\$0	\$126,972
		Sub-Total Impact		
TOTAL	\$250,000		\$164,219	\$414,219

- \$123,028 will be used as our Intergovernmental Transfer (IGT) for FQHC LIP funding from AHCA and we anticipate receiving an additional \$287,247. These combined funds will be used for Emergency Room Diversion, Diagnostic Services and Preventative Care for the most vulnerable in Duval County.
- \$126,972 will be used for uncompensated care for uninsured and indigent patients.

Reimbursement of expenses by the COJ concerning the \$126,972 shall occur after proof of accounting backup (paid invoices, pay stubs, approved accounting system showing expenditure of funds, and/or receipts along with copies of promotional materials as appropriate) and other documentation satisfactory to the City.

PROGRAM IMPACT & REPORTING: The Program’s targets, goals, and objectives (TGOs) are hypertension control (HC), blood glucose control, and a diagnosis of pre-diabetes, if indicated, for persons overweight or obese. To impact population health outcomes, Agape will do the following: 1) outreach, 2) use health informatics, 3) coordinate, co-locate, and integrate medical and behavioral health services, 4) monitor program metrics, and 5) evaluate Program implementation. Quantitative data will measure the objectives. For example, “[Hypertension] control (HC) is Systolic Blood Pressure less than 140 mmHg and Diastolic Blood Pressure less than 90 mmHg because of treatment, lifestyle modification, and pharmacologic therapy.³ Agape will track the percentage of pre-treatment hypertensives who achieved HC. The approach described here consists of defining metrics, using a pretreatment baseline or reference point, taking at least two empirical post treatment measurements, and computing improvement, (temporal change). The Program’s achievements during the year immediately preceding this funding request were reduction in Emergency Room visits for inappropriate or non-emergent care and timely and appropriate use of health care services to ameliorate disease, and to improve or maintain function. The anticipated number of Duval County residents the Program will service is 800. The projected Program impact on those residents will be:

- Fewer sick days,
- More time for quality family interactions, productivity, and leisure,
- Less time and fewer dollars for unmanaged chronic disease states, and
- Proactive control of poor health habits that culminate in advanced and debilitating disease processes.

ADDITIONAL GRANT REQUIREMENTS AND RESTRICTIONS: Recipient’s expenditure of City funds for the Program and the provision of services shall be subject to Chapter 118, Parts 1 – 5 of the *Jacksonville Ordinance Code*, and the terms and conditions of any contract entered into between the City and Recipient. Recipient shall use the City funds for the Program in accordance with the City Council approved Term Sheet and Program budget. The City’s Grant Administrator may amend this Term Sheet or the approved Program budget consistent with the Program’s needs, provided that any substantial change to this Term Sheet or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

³ doi [10.1161/CIRCOUTCOMES.111.963439](https://doi.org/10.1161/CIRCOUTCOMES.111.963439)

FY 2025 City Grant - Complete Program Budget Detail

Lead Agency: AGAPE Community Health Center, Inc.

Program Name: Low-Income Pool

Agency Fiscal Year: 2024-2025

BUDGET

Categories and Line Items	Prior Year Prgr Funding FY 2022-2023	Current Year Prgr Budget FY 2023-2024	Total Est. Cost of Program FY 2024-2025	Funding Partners				
				Agency Provided Funding	All Other Program Revenues	City of Jacksonville (City Grant)	Federal/ State & Other Funding	Private Foundation Funding
I. Employee Compensation								
Personnel - 01201 (list Job Title or Positions no names)								
1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
16	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
19	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
21	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
24	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
25	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
27	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
29	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Employee Compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Fringe Benefits								
Payroll Taxes - FICA & Med Tax - 02101	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Health Insurance - 02304	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Retirement - 02201	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Dental - 02301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Life Insurance - 02303	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Workers Compensation - 02401	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Unemployment Taxes - 02501	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Benefits - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Taxes and Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Employee Compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
II. Operating Expenses								
Occupancy Expenses								
Rent - Occupancy -04408	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Telephone - 04181	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Utilities - 04301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Maintenance and Repairs - 04603	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Insurance Property & General Liability - 04502	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Office Expenses								
Office and Other Supplies - 05101	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Postage - 04101	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Printing and Advertising - 04801	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Publications - 05216	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Staff Training - 05401	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Directors & Officers - Insurance - 04501	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Professional Fees & Services (not audit) - 03410	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Background Screening - 04938	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - Equipment under \$1,000 - 06403	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Expenses								
Local Mileage - 04021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Parking & Tools - 04028	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Equipment Expenses								
Rental & Leases - Equipment - 04402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Vehicle Fuel and Maintenance - 04216	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Vehicle Insurance -04502	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Client Expenses - 08301								
Client Rent	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Food	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Medical	\$0.00	\$388,356.00	\$414,219.00	\$0.00	\$0.00	\$126,972.00	\$287,247.00	\$0.00
Client Educational	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Personal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Other (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Other (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Operating Expenses	\$0.00	\$388,356.00	\$414,219.00	\$0.00	\$0.00	\$126,972.00	\$287,247.00	\$0.00
III. Operating Capital Outlay (OVER \$1,000)								
Machinery & Equipment - 06402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computers & Software - 06427	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Capital Outlay	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Expenses Total	\$0.00	\$388,356.00	\$414,219.00	\$0.00	\$0.00	\$126,972.00	\$287,247.00	\$0.00
Percent of Budget	-	-	100.0%	0.0%	0.0%	30.7%	69.3%	0.0%

Last Modified: 07/08/2024

All City Grant items listed must be included in the narrative section of the budget.

Grant Recipient: I.M. Sulzbacher Center for the Homeless, Inc. (“Recipient”)

Program Name: Urban Rest Stop (the “Program”)

City Funding Request: \$270,000.00

Contract/Grant Term: October 1, 2024– September 30, 2025

Any substantial change to this FY 2024-2025 City Grant Proposal Term Sheet (the “Term Sheet”) or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

PROGRAM OVERVIEW:

The Urban Rest Stop is a collaboration between the City of Jacksonville, Sulzbacher, the Mental Health Resource Center (MHRC) and the Link and Quest program. This 6,000 square foot space located on the Sulzbacher main campus includes a large 15 stall shower and 10 stall toilet as well as laundry facilities, an outdoor deck, a multi-purpose lounge and an area for Link/Quest staff. This co-location has enabled unsheltered homeless clients, who are not currently staying at a shelter and /or do not have access to resources during the day, to have access to necessary sanitary facilities as well as meals, medical attention, personal storage facilities and a place to simply rest all at a single location thus overcoming the barrier of transportation. As the city’s homeless coordinated intake location, the Urban Rest Stop also acts as a portal to shelter throughout the city and to the multitude of services available from all homeless service providers.

This funding request is for programmatic expenses for FY 2024-2025.

PROGRAM SCOPE OF WORK AND DELIVERABLES:

The Urban Rest Stop is managed by Sulzbacher and is located on the Sulzbacher downtown campus. The Urban Rest Stop provides a safe place for the street homeless to rest and attend to basic needs such as bathing, laundry, meals, and healthcare. As well as access to showers, bathrooms, laundry, a place to receive mail and a space to sit/read and wait for appointments-which is not currently available to them anywhere else during the day (other than the public library), a full range of community services and resources are available that also includes referral to Coordinated Intake where they gain access to a host of other community services including case management, employment referrals, substance abuse counseling, entitlement application assistance as well as job assistance and the full range of health care services available at the Sulzbacher medical clinic. Providing so many services at a single location eliminates transportation as a barrier to care for clients and facilitates the delivery of other community assets. Furthermore, Sulzbacher runs a free daily shuttle service throughout the city connecting individuals with other homeless service agencies.

This innovative collaboration directly addresses not only the goal of the Mayor’s Task Force on Homelessness “to increase entry points into services using existing capacity” but also the goal in the Jacksonville City Council’s 3-year plan “to increase services during the day for the local street homeless population” by co-locating the agency that intakes all clients into the homeless service system with the largest and most comprehensive provider of services for this population.

PROGRAM COSTS/PAYMENT TERMS:

See the attached FY 2024-2025 Budget Forms.

The Homeless Continuum of Care Project, the Urban Rest Stop (URS), costs toward which these funds are to be used includes:

- **Weekend Part Time Staff** - 2 staff persons x 16 hours week = COJ \$33,391.12
- **Storage Advocate** – Oversight and management of storage facility = COJ \$38,937.60
- **Urban Rest Stop Advocate** – Front line client contact = COJ \$42,182.40
- **Taxes & Benefits** – COJ \$19,032.88
- **Utilities Costs** – COJ \$20,000
- **Equipment Rental** – COJ \$3,300
- **Direct Client Expenses** – COJ \$15,000
- **Security Weekdays** – COJ \$66,000
- **Janitorial Staff** – COJ \$32,156

The City is authorized to reimburse the Recipient on receipt of evidence that, by way of example and not exclusion, a JSO security officer was paid for services at facility during daytime hours, utilities, maintenance, persons received emergency shelter, were rehoused, education and training were provided, health care was provided. In addition, a narrative report will be submitted with each reimbursement request concerning the numbers of homeless persons assisted and outcomes during the period for which reimbursement is sought demonstrating success of the Program in meeting its objectives.

PROGRAM IMPACT & REPORTING:

Program goals are to provide hot showers, laundry, meals and job opportunities to unsheltered, homeless individuals as well as facilities where they can rest. While on the Sulzbacher campus, clients also have available to them healthcare and referral to other community resources. Clients find their way to the Sulzbacher campus either by foot or by the Sulzbacher shuttle, which circulates throughout the city daily.

According to the Jacksonville Sheriff's Office, misdemeanor lifestyle crimes in the downtown area have been reduced by 50% since the URS opened. Since Coordinated Intake has moved to Changing Homelessness, there is no way to measure how many URS clients have been referred to housing but if we assume that the 178 individuals placed into stable employment are also assisted into stable housing then a rough measurement of the economic impact of the URS can be estimated. According to a 2017 study by the National Alliance to End Homelessness, on average it costs the community \$35,578 for a person to be unsheltered on the street (cost of arrests, social services, emergency rooms, etc.) and \$30,767 annually to be placed into supportive housing, a \$4,811 net annual savings. Using those findings, the 178 individuals placed into stable employment could represent an annual savings to society of \$856,358, not to mention the inestimable value of someone formerly homeless now becoming a tax-paying member of society. Well worth the \$270,000 investment.

In the first six months of the current contract year, URS has provided 5,595 showers, 499 loads of laundry, 143,951 meals and placed 89 individuals into employment. Extrapolated to the end of the year this amounts to: 11,190 showers, 998 loads of laundry, 287,902 meals, and 178 individuals employed.

While there is no way to project the number of individuals who will seek out the services of the URS, the extreme shortage of affordable housing nearly guarantees a significant increase in homelessness in the immediate future.

ADDITIONAL GRANT REQUIREMENTS AND CONDITIONS:

Recipient's expenditure of City funds for the Program and the provision of services shall be subject to Chapter 118, Parts 1 – 5 of the *Jacksonville Ordinance Code*, and the terms and conditions of any contract entered into between the City and Recipient. Recipient shall use the City funds for the Program in accordance with the City Council approved Term Sheet and Program budget. The City's Grant Administrator may amend this Term Sheet or the approved Program budget consistent with the Program's needs, provided that any substantial change to this Term Sheet or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

FY 2023-24 PSG/ City Grant - Program Budget Detail

Lead Agency:
 I.M. Sulzbacher Center for the Homeless, Inc.
 Program Name:
 Urban Rest Stop

Agency Fiscal Year:
 July 1 - June 30

BUDGET

Categories and Line Items	Prior Year Prg Funding FY 2022-2023	Current Year Prg Budget FY 2023-2024	Total Est. Cost of Program FY 2024-2025	Funding Partners				
				Agency Provided Funding	All Other Program Revenues	City of Jacksonville (City Grant)	Federal/ State & Other Funding	Private Foundation Funding
I. Employee Compensation								
Personnel - 01201 (list Job Title or Positions)								
1 Weekend Staff (2 staffpersons)	\$23,296.00	\$26,624.00	\$33,391.12	\$0.00	\$0.00	\$33,391.12	\$0.00	\$0.00
2 Maintenance Staff	\$8,030.00	\$8,028.00	\$8,120.00	\$8,120.00	\$0.00	\$0.00	\$0.00	\$0.00
3 Urban Rest Stop Program Director	\$67,626.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 Additional hours for weekend staff and JSO	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5 Storage Advocate	\$0.00	\$36,000.00	\$38,937.60	\$0.00	\$0.00	\$38,937.60	\$0.00	\$0.00
6 Urban Rest Stop Advocate	\$0.00	\$36,000.00	\$42,182.40	\$0.00	\$0.00	\$42,182.40	\$0.00	\$0.00
7	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
16	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
19	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
21	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
24	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
25	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
27	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
29	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Employee Compensation	\$98,952.00	\$106,652.00	\$122,631.12	\$8,120.00	\$0.00	\$114,511.12	\$0.00	\$0.00
Fringe Benefits								
Payroll Taxes - FICA & Med Tax - 02101	\$6,955.00	\$6,342.00	\$8,760.10	\$0.00	\$0.00	\$8,760.10	\$0.00	\$0.00
Health Insurance - 02304	\$12,505.00	\$3,492.00	\$8,329.00	\$0.00	\$0.00	\$8,329.00	\$0.00	\$0.00
Retirement - 02201	\$1,636.00	\$0.00	\$1,300.00	\$0.00	\$0.00	\$1,300.00	\$0.00	\$0.00
Dental - 02301	\$0.00	\$0.00	\$561.00	\$0.00	\$0.00	\$561.00	\$0.00	\$0.00
Life Insurance - 02303	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Workers Compensation - 02401	\$2,318.00	\$0.00	\$82.78	\$0.00	\$0.00	\$82.78	\$0.00	\$0.00
Unemployment Taxes - 02501	\$1,236.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Benefits - (Disability)	\$899.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Taxes and Benefits	\$25,549.00	\$9,834.00	\$19,032.88	\$0.00	\$0.00	\$19,032.88	\$0.00	\$0.00
Total Employee Compensation	\$124,501.00	\$116,486.00	\$141,664.00	\$8,120.00	\$0.00	\$133,544.00	\$0.00	\$0.00
II. Operating Expenses								
Occupancy Expenses								
Rent - Occupancy -04408	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Telephone - 04181	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Utilities - 04301	\$18,346.00	\$1,200.00	\$1,200.00	\$1,200.00	\$0.00	\$2,000.00	\$0.00	\$0.00
Maintenance and Repairs - 04603	\$0.00	\$1,200.00	\$30,000.00	\$30,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Insurance Property & General Liability - 04502	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - Janitorial Supplies	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Office Expenses								
Office and Other Supplies - 05101	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Postage - 04101	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Printing and Advertising - 04801	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Publications - 05216	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Staff Training - 05401	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Directors & Officers - Insurance - 04501	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Professional Fees & Services (not audit) - 03410	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
67	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - Equipment under \$1,000 - 06403	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Expenses								
Local Mileage - 04021	\$0.00	\$600.00	\$300.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Transportation	\$45,000.00	\$9,600.00	\$9,600.00	\$9,600.00	\$0.00	\$0.00	\$0.00	\$0.00
Equipment Expenses								
Rental & Leases - Equipment - 04402 Rental of Washers/Dryer	\$19,140.00	\$3,300.00	\$3,300.00	\$0.00	\$0.00	\$3,300.00	\$0.00	\$0.00
Vehicle Fuel and Maintenance - 04216	\$0.00	\$10,800.00	\$4,000.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Vehicle Insurance -04502	\$0.00	\$10,500.00	\$30,100.00	\$30,100.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Client Expenses - 08301								
Client Rent	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Food - Breakfasts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Food - Lunches	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Educational	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Personal	\$0.00	\$18,146.00	\$12,000.00	\$12,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Other Temporary Supportive Housing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Other-Detergent, soap, shampoo, towels, paper products	\$25,000.00	\$7,000.00	\$15,000.00	\$0.00	\$0.00	\$15,000.00	\$0.00	\$0.00
Other Expenses								
Other - Security - Weekdays (7 day)	\$109,260.00	\$167,332.00	\$66,000.00	\$0.00	\$0.00	\$66,000.00	\$0.00	\$0.00
Other - Security - Weekends	\$56,160.00	\$33,072.00	\$33,072.00	\$33,072.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - Janitorial staff	\$0.00	\$0.00	\$32,156.00	\$0.00	\$0.00	\$32,156.00	\$0.00	\$0.00
Other - Security - Storage facility for client's possessions	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Operating Expenses	\$313,156.00	\$262,750.00	\$236,728.00	\$120,272.00	\$0.00	\$136,456.00	\$0.00	\$0.00
III. Operating Capital Outlay (OVER \$1,000)								
Machinery & Equipment - 06402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computers & Software - 06427	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Capital Outlay	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Expenses Total	\$437,657.00	\$379,236.00	\$378,392.00	\$128,392.00	\$0.00	\$270,000.00	\$0.00	\$0.00
Percent of Budget	100%	-	100.0%	33.9%	0.0%	71.4%	0.0%	0.0%

Last Modified: 02/11/2020

All City Grant items listed must be included in the narrative section of the budget.

**Budget Narrative for Selected Items of Cost
 FY 2022 PSG/ City Grant Application
 Program Budget Narrative (Max. 2 Pages)
 Proposed Funding Period: FY 2021-2022
 COJ Funding Only**

Agency: I.M. Sulzbacher Center for the Homeless, Inc.

Program Name: Urban Rest Stop

EXPENSES: Please provide narrative description for all categories listed below for which you are seeking City Funding Only. We have included those required elements in the spaces below. See instructions when listing personnel expenses. Please feel free to add additional lines as necessary to provide explanations using the line insert feature.

I. Employee Compensation -

COJ

(not related to costs of the office of the governor of a state or the chief executive of a political subdivision)

Salary & Wages

Weekend Part Time Staff - 2 staff
 persons 16 hours each/week \$33,391

Storage Advocate - manages
 storage facility \$38,938

Urban Rest Stop Advocate - front
 line staff contact with URS clients. \$42,182

Payroll Taxes & Benefits

Figured at 17% of salary \$19,033

Occupancy Expenses

Utilities \$20,000

Equipment

Washer/dryer rentals \$3,300

Direct Client Expenses

Program Supplies - total cost of
 detergent, soap, shampoo, towels,
 cleaning supplies and paper
 products. \$15,000

Other - Security

Security (week) - FSC Security on
 site rotation during daytime
 operating hours. \$66,000

Other - Janitorial staff

Goodwill Staff- to clean URS area \$32,156

Total Expenses **\$270,000**

III. Operating Capital Outlay:

VOLUNTEERS IN MEDICINE JACKSONVILLE, INC. – WEST JACKSONVILLE CLINIC

FY 2024-2025 City Grant Proposal Term Sheet

Grant Recipient: Volunteers in Medicine Jacksonville, Inc. (“VIM” or “Recipient”)

Program Name: West Jacksonville Clinic (the “Program”)

City Funding Requests: \$200,000

Contract/Grant Term: October 1, 2024– September 30, 2025

Any substantial change to this FY 2024-2025 City Grant Proposal Term Sheet (the “Term Sheet”) or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

PROGRAM OVERVIEW: Volunteers in Medicine (VIM) is a full-service clinic that has provided free primary and specialty services to low-income and uninsured adults since 2003. Our mission is “to advance the physical, mental, and emotional well-being of the working uninsured to improve quality of life for all.”

The Need to be Met: VIM’s first satellite clinic, the West Jacksonville Clinic, opened in June 2020 in the middle of the pandemic. VIM provided continuous services throughout that crisis, and now provides a “medical home” for residents of the 32210 area and surrounding community where 16.4% of the residents live below the poverty line (about 1.4 times the rate of Jacksonville metro area) and 8.2% are foreign born (U.S. Census). Among those who are employed, 17.2% are uninsured. One out of every 20 workers 16 years or older residing in the area does not have a vehicle available, severely limiting their flexibility in accessing social services, especially healthcare. Of the households surrounding the West Jacksonville Clinic, 30.7% have an income of less than \$20,000 a year, and 25.9% live below the poverty line.

The West Jax Clinic is located within the Inspire to Rise Community Center, where it fills a crucial niche in their array of family-based social services. The Blue Zones Project Jacksonville has also identified this zip code as a priority neighborhood with the intent to significantly improve the well-being of residents in the area.

Program Goals: The VIM Jacksonville Clinic’s goals are to provide the following free services to this at-risk community: a) comprehensive primary care, b) preventive screenings for common chronic conditions and dangerous diseases that typically include diabetes, hypertension, anxiety, and cancers; and c) referrals to specialty care for sixteen specialties that include gynecology, dermatology, psychiatry, vision care, oncology, neurology, pulmonology, cardiology and more.

This 2024-2025 funding request will cover programmatic expenses that include the salary of our Medical Director and Medical Assistant, monthly rent, cleaning of the facility, medical supplies, and lifesaving medications.

PROGRAM SCOPE OF WORK AND DELIVERABLES:

1. 200 patients will receive medical care, including primary care and specialty care.
2. 90% of patients will have body mass index and blood pressure monitored.
3. 100% of patients receiving prescriptions will have access to free medications from VIM’s dispensary (estimate 33 RX per quarter).
4. 100% of patients diagnosed with diabetes and/or hypertension will be counseled in chronic disease management and offered nutritional counseling and lifestyle management classes.
5. 90% of patients will be evaluated with a PHQ-2 assessment tool to determine if they require mental health services; 100% of those who do will be referred to a VIM provider.
6. 100% of patients requiring specialty referrals will be referred to a specialist and receive follow-up care with their VIM provider.

PROGRAM COSTS/PAYMENT TERMS:

Salary and Wages

Medical Asst. (provides clinical support to physicians and nurses; maintains medical supply inventory and gives direction to volunteer administrative staff)

\$60,000.00

Medical Dir. (Provides direct patient care; examines and coordinates all practice activities to ensure medical compliance; addresses all labs and imaging results)

\$30,000.00

Dir. of Volunteers (Recruits, retains and stewards volunteer doctors, nurses and lay persons who provide direct services to the patients)

\$25,000.00

Office Manager (computer functionality, wifi, supply orders, mail, new staff onboarding)

\$20,000.00

Payroll Taxes & Benefits

Payroll Taxes

\$10,000.00

Health Insurance

\$8,200.00

Occupancy Expenses

Rent

\$24,000.00

Office Expenses

Office and Other Supplies

\$3,000.00

Printing and advertising

\$3,680.00

Other-Cleaning

\$6,120.00

Direct Client Expenses

Client Medical

\$4,500.00

Client other medicine

\$5,500.00

Total

\$200,000.00

IMPACT & REPORTING: Having a medical home that provides basic preventative healthcare services can be the difference between life and death. Proper management of chronic conditions, rooted in support and accountability, prevents numerous negative consequences.

1. VIM will recruit patients in the West Jacksonville area. The Outreach Manager will work with the Volunteer Manager to recruit and train a PEACE volunteers outreach group that attends outreach events such as community health fairs, church events, and speaking engagements to promote services.
2. The result will be attainment of 200 patients who will be served by the Medical Director and the Medical Assistant. Patient activities and data will be documented in the Electronic Medical Records system (eCW). VIM's West Jax Clinic also has clinical volunteers who assist with medical services, and utilizes the services of volunteer pharmacists.

3. VIM will monitor and document patients' crucial data in their patient files, including body mass index, blood pressure, and behavioral health screenings (PHQ-2).
4. VIM will provide free non-narcotic prescriptions to all patients needing medications. The medications will be documented in VIM's electronic pharmacy system (QS1). The dispensary is located at VIM's primary location in South San Marco.
5. Patients needing specialty referrals are linked to a VIM specialist (for example, for Women's Care) or the WeCare referral service. VIM provides follow-up care for all specialist procedures.

The previous grant's six-month's report indicates that VIM is on track to meet goals and objectives: VIM's West Jax Clinic will serve 200 low-income working adults, 95% have had BMI and blood pressure monitored, 100% of patients needing medications have attained them, 100% of patients with diabetes or other chronic diseases have been provided with follow-up counseling and services. All results are documented in VIM's electronic medical records and other electronic devices (e.g., laptops) which are maintained by the Office Manager.

If we are to ensure that the people in the 32210-zip code area can be healthy, fully participating citizens, they must have a clinic available to them, operating at times when they are able to use it.

ADDITIONAL GRANT REQUIREMENTS AND RESTRICTIONS: Recipient's expenditure of City funds for the Program and the provision of services shall be subject to Chapter 118, Parts 1 – 5 of the *Jacksonville Ordinance Code*, and the terms and conditions of any contract entered between the City and Recipient. Recipient shall use the City funds for the Program in accordance with the City Council approved Term Sheet and Program budget. The City's Grant Administrator may amend this Term Sheet and the approved Program budget consistent with the Program's needs, provided that any substantial change to this Term Sheet or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

FY 2025 City Grant - Complete Program Budget Detail

Lead Agency: Volunteers in Medicine Jacksonville, Inc.

Program Name: West Jax Clinic

Agency Fiscal Year: October 1, 2024-September 30, 2025

BUDGET

Categories and Line Items	Prior Year Prg Funding FY 2022-2023	Current Year Prg Budget FY 2023-2024	Total Est. Cost of Program FY 2024-2025	Funding Partners				
				Agency Provided Funding	All Other Program Revenues	City of Jacksonville (City Grant)	Federal/ State & Other Funding	Private Foundation Funding
I. Employee Compensation								
Personnel - 01201 (list Job Title or Positions no names)								
Medical Assistant	\$55,000.00	\$55,000.00	\$60,000.00	\$0.00	\$0.00	\$60,000.00	\$0.00	\$0.00
Medical Director	\$80,000.00	\$50,000.00	\$30,000.00	\$0.00	\$0.00	\$30,000.00	\$0.00	\$0.00
Director of Volunteers	\$0.00	\$51,000.00	\$61,000.00	\$0.00	\$0.00	\$25,000.00	\$36,000.00	\$0.00
Office Manager	\$0.00	\$58,965.18	\$61,765.18	\$0.00	\$0.00	\$20,000.00	\$41,765.18	\$0.00
5	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
16	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
17	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
19	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
20	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
21	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
24	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
25	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
27	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
29	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Employee Compensation	\$135,000.00	\$214,965.18	\$212,765.18	\$0.00	\$0.00	\$135,000.00	\$77,765.18	\$0.00
Fringe Benefits								
Payroll Taxes - FICA & Med Tax - 02101	\$0.00	\$9,000.00	\$10,000.00	\$0.00	\$0.00	\$10,000.00	\$0.00	\$0.00
Health Insurance - 02304	\$18,279.00	\$7,200.00	\$8,200.00	\$0.00	\$0.00	\$8,200.00	\$0.00	\$0.00
Retirement - 02201	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Dental - 02301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Life Insurance - 02303	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Workers Compensation - 02401	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Unemployment Taxes - 02501	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Benefits - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal Taxes and Benefits	\$18,279.00	\$16,200.00	\$18,200.00	\$0.00	\$0.00	\$18,200.00	\$0.00	\$0.00
Total Employee Compensation	\$153,279.00	\$231,165.18	\$230,965.18	\$0.00	\$0.00	\$153,200.00	\$77,765.18	\$0.00
II. Operating Expenses								
Occupancy Expenses								
Rent - Occupancy -04408	\$24,000.00	\$30,000.00	\$24,000.00	\$0.00	\$0.00	\$24,000.00	\$0.00	\$0.00
Telephone - 04181	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Utilities - 04301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Maintenance and Repairs - 04603	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Insurance Property & General Liability - 04502	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Office Expenses								
Office and Other Supplies - 05101	\$0.00		\$3,000.00	\$0.00	\$0.00	\$3,000.00	\$0.00	\$0.00
Postage - 04101	\$3,866.00	\$2,000.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Printing and Advertising - 04801	\$2,000.00	\$1,000.00	\$3,880.00	\$0.00	\$0.00	\$3,880.00	\$0.00	\$0.00
Publications - 05216	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Staff Training - 05401	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Directors & Officers - Insurance - 04501	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Professional Fees & Services (not audit) - 03410	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Background Screening - 04938	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - Equipment under \$1,000 - 06403	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - Cleaning	\$3,600.00	\$3,600.00	\$6,120.00	\$0.00	\$0.00	\$6,120.00	\$0.00	\$0.00
Travel Expenses								
Local Mileage - 04021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Parking & Tools - 04028	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Equipment Expenses								
Rental & Leases - Equipment - 04402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Vehicle Fuel and Maintenance - 04216	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Vehicle Insurance -04502	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Client Expenses - 08301								
Client Rent	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Food	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Medical	\$5,000.00	\$4,500.00	\$4,500.00	\$0.00	\$0.00	\$4,500.00	\$0.00	\$0.00
Client Educational	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Personal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Client Other Medicine	\$8,455.00	\$5,500.00	\$5,500.00	\$0.00	\$0.00	\$5,500.00	\$0.00	\$0.00
Client Other (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Operating Expenses	\$46,721.00	\$46,600.00	\$48,800.00	\$0.00	\$0.00	\$46,800.00	\$0.00	\$0.00
III. Operating Capital Outlay (OVER \$1,000)								
Machinery & Equipment - 06402	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computers & Software - 06427	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other - (Please describe)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Capital Outlay	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct Expenses Total	\$200,000.00	\$277,765.18	\$279,765.18	\$0.00	\$0.00	\$200,000.00	\$77,765.18	\$0.00
Percent of Budget	-	-	100.0%	0.0%	0.0%	71.5%	27.8%	0.0%

Last Modified: 02/16/2024

All City Grant items listed must be included in the narrative section of the budget.

**Budget Narrative for Selected Items of Cost
 FY 2024 City Grant Application
 Program Budget Narrative (Max. 2 Pages)
 Proposed Funding Period: FY 2024-2025
 COJ Funding Only**

Agency: Volunteers in Medicine Jacksonville, Inc.

Program Name: West Jacksonville Clinic

EXPENSES: Please provide narrative description for all categories listed below for which you are seeking **City Funding Only**. We have included those required elements in the spaces below. See instructions when listing personnel expenses. Please feel free to add additional lines as necessary to provide explanations using the line insert feature.

I. Employee Compensation - (not related to costs of the office of the governor of a state or the chief executive of a political subdivision)

Salary & Wages to include OT/Bonus, and shift differential compensation

1 <i>Medical Asst.</i> (Provides clinical support to physicians and nurses; maintains medical supply inventory and gives direction to volunteer administrative staff)	\$60,000.00	Full time Medical Assistant
2 <i>Medical Dir.</i> (Provides direct patient care; examines and coordinates all practice activities to ensure medical compliance; addresses all labs and imaging results)	\$30,000.00	Part time West Jax Medical Director @\$76/hour and portion of Full Time Medical Director at South San Marco Clinic to provide patient care
3 <i>Dir. of Volunteers</i> (Recruits, retains and stewards all volunteer doctors, nurses and lay persons who provide direct services to the patients)	\$25,000.00	The clinic uses 3-5 volunteers a month and volunteers must be recruited, screened, and scheduled. The Director of Volunteers coordinates this activity for both South San Marco and West Jacksonville Clinics
4 <i>Office Manager</i> (Manages computer functionality, wifi, power, supply orders, mail, troubleshooting, new staff onboarding)	\$20,000.00	The office manager oversees administrative functions of both the South San Marco Clinic and the West Jax Clinic. The office manager is a full-time position; she spends roughly 30% of her time assisting the West Jax Clinic

Payroll Taxes & Benefits

Payroll Taxes	\$10,000.00	Payroll taxes are roughly 7.5% of salaries
Health Insurance	\$8,200.00	Portion of full time salaried staff dedicated to West Jax

II Operating Expenses

Occupancy Expenses

Rent	\$24,000.00	Est \$2,000/month
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Office Expenses

Office and Other Supplies	\$3,000.00	Medical supplies, office supplies, disposable bed sheets, tongue depressants, etc.
Printing and advertising	\$3,680.00	Brochures printed, signage for events, flyers, Facebook marketing ads
Other-Cleaning	\$6,120.00	Cleaning crew at \$510/month

Direct Client Expenses

Client Medical	\$4,500.00	Imaging, labs, screenings, tests, etc.
Client other: Medicines	\$5,500.00	Client medications necessary for management of ongoing chronic and acute needs

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Total **\$200,000.00**

LOAN AGREEMENT TERMS SHEET

Proposed Terms and Conditions for a Funding Agreement
between
the City of Jacksonville (City) and Self-Help Ventures Fund (SHVF)
for
City Funding of \$10 million for Establishment of a Jacksonville Affordable Housing
Fund (“Fund”) to be administered by SHVF

Any substantial change to these Proposed Terms and Conditions will require Council and SHVF approval

- There shall be an executed Loan Agreement (the “Agreement”) between the City and SHVF, a North Carolina domiciled certified community development financial institution loan fund, incorporating the following specific terms and conditions, in addition to any applicable City terms and conditions and any other contractual provisions, as reasonably required by either party or their respective Offices of General Counsel.

- The purpose of the Fund is to preserve and construct affordable housing in Duval County, Florida through two loan products: (1) a bridge acquisition & predevelopment loan product (“Bridge Financing”) and (2) a long-term subordinated (mezzanine) gap financing loan product (“Mezzanine Financing”). Loans made with either the Bridge Financing or Mezzanine Financing product are referred to herein as “Fund Loans.” The Bridge Financing loan funds will be repaid as Bridge Financing borrowers repay.

- Pursuant to the Agreement, and subject to a lawful appropriation of funds, the City will make a zero interest, non-recourse loan to SHVF for a term of twenty years commencing on the Fully Funded Date (defined below), the amount of \$10,000,000 (the “City Loan Funds”) to be administered by SHVF in accordance with the Fund requirements. SHVF and local private investor partners intend to raise an additional \$30,000,000 from other investors to capitalize the Fund on or before March 31, 2025 (the “Fully Funded Date”).

- The Agreement shall have a term expiring on the earlier of twenty years from the Fully Funded Date, or upon the mutual agreement of the parties. City Loan Funds shall be deemed “first loss” in the event of any losses incurred in connection with Fund Loans, but otherwise shall be disbursed pro rata with all other loan funds in the Fund. “Losses” shall mean the amount of all unpaid principal, interest, and fees with respect to a Fund Loan, plus reasonable costs of collection with respect to a Fund Loan, including without limitation reasonable attorneys’ fees and legal expenses, and all other reasonable expenses incurred in connection with the protection or realization of any security given for a Fund Loan to the extent not otherwise recovered from the borrower. All non-loss principal of the City Loans Funds will be returned lump sum to the City upon expiration of the City Loan Fund term.

- SHVF shall process and underwrite loan applications from third-party developers for the purchase and/or construction of affordable housing projects pursuant to its standard underwriting criteria. Priority shall be given to developers with recent, relevant affordable housing development experience, prioritizing projects seeking 4% Low Income Housing Tax Credits (LIHTC) through the Jacksonville Housing Finance Authority. SHVF will endeavor to deploy up to 25% of the Fund as Bridge Financing.

- SHVF shall prioritize Fund Loans for affordable housing projects eligible under LIHTC. All projects funded with Fund Loans shall be located within Duval County. SHVF shall document to the City a minimum of at least \$30,000,000 in commitments of non-City funding for Fund prior to disbursement of any City Loan Funds. At a minimum, the project must create or preserve affordable housing units affordable to households at or below 80% Area Median Income (AMI), with a preference for serving households at or below 60% AMI and maintaining affordability to avoid displacement of existing low- and moderate-income tenants. Affordability shall be based on households paying no more than 30% of gross income on housing-related expenses. Mixed-income developments are eligible to apply and will be considered on a case-by-case basis based on the level of affordability proposed. At a minimum, 50% of units must be affordable to 80% AMI households or below. Mixed-use developments are eligible to apply provided the Loan supports only qualifying residential uses.
- SHVF shall provide, on a no less frequently than annual basis, reports and other documentation to the City regarding: qualifications of approved developers and project descriptions, including number of affordable housing units; status of use or deployment of funds; delinquency reports, collections efforts, and analysis; noncompliance reports, , and other documentation and information as reasonably requested by the City. SHVF will also submit an audited annual report, inclusive of audited financial statements (with a due date of December 31 of each year) detailing actual disbursements made from the Fund and status of loan funds disbursed.
- SHVF shall be responsible for complying with all applicable federal, state or local legal requirements in connection with the Agreement and its operation and administration of the Fund.
- The City's administrative staff, and the City Council Auditors office, shall have the right to audit SHVF records ordinarily retained by commercial lenders under similar circumstances relating to the Fund and supporting documentation for all disbursements thereof at reasonable times and upon reasonable notice.

JACKSONVILLE SYMPHONY ASSOCIATION, INC. – Operational Support

FY 2024-2025 City Grant Proposal Term Sheet

Grant Recipient: Jacksonville Symphony Association, Inc. (“Recipient” or “Symphony”)

Program Name: Operational Expenses (the “Program”)

City Funding Request: \$500,000

Contract/Grant Term: October 1, 2024 – September 30, 2025

Any substantial change to this FY 2024-2025 City Grant Proposal Term Sheet (the “Term Sheet”) or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

PROGRAM OVERVIEW:

Funding Request for Programmatic Expenses:

The Jacksonville Symphony’s funding request is intended to support the Symphony’s most treasured asset: our 60 full-time musicians. The Symphony can’t achieve its mission to enrich the human spirit through symphonic music without our musicians. Funding will ensure that the Symphony will be able to perform 40 weeks of concerts at Jacoby Symphony Hall during our 75th Anniversary Season in FY25 and our musicians will also be available to the Jacksonville community as resident artists, teachers, and performers. Jacksonville Symphony musicians live and work full-time in Duval County, paying taxes, raising their families, and sending their children to local schools. The Symphony is also the engine that drives economic activity downtown 40 weeks per year and employs 100 full-time and 125 part-time musicians and staff, and more than 120 independent contractors each season.

Brief Program Description:

What started in 1949 as a part-time performance group housed in the City’s Civic Auditorium has blossomed into a world-class symphony orchestra with 60 full-time musicians and a 40-week season of performances in Jacoby Symphony Hall located within the Jacksonville Center for the Performing Arts. As we embark on our 75th Anniversary Season, the Jacksonville Symphony is the largest arts organization in Northeast Florida and has become the cultural heart of our region, connecting and serving our community through diverse artistic offerings and a broad range of music education programs that reflect residents of all ages, races, and socio-economic statuses. The Symphony annually serves 165,000 community members including 90,000 patrons attending concerts in Jacoby Symphony Hall, 4,000 patrons enjoying ensemble performances throughout Duval County and 70,000 students participating in music education programs.

(See Program Scope of Work and Deliverables question on page 2 for a complete list of FY25 season concerts.)

Need in the Community:

The arts have the power to transform individuals and communities. Studies show orchestras play a vital role improving the quality of life in communities by stimulating economic growth, attracting new residents and business development, improving health and well-being, increasing academic success, encouraging creativity, and fostering a sense of community and cultural enrichment.

Whether performing beloved classics, innovative contemporary music or commissioned new works, the Jacksonville Symphony sets the standard for exceptional music in Northeast Florida, providing a cultural vibrancy to our community that improves the quality of life for all.

Beyond the concert hall, the Jacksonville Symphony plays a crucial role in music education by providing access to live symphonic music that will enrich, uplift, and inspire children in boundless ways, paving the way for more connected communities and a better future. Although numerous research studies have found that arts education helps foster young imaginations and facilitates students' academic success, local school systems continue to experience reduced arts education budgets. As the largest music education provider in Northeast Florida, the Jacksonville Symphony has stepped in to fill this arts education gap. In FY24, more than 70,000 students participated in our in-person and virtual music education programs, including students at 117 Title I schools.

Program Goals and Objectives:

The Jacksonville Symphony's Strategic Plan features five goals that set an ambitious agenda for FY25:

Objectives for Goal #1: Acquire Resources for Financial Stability

1. Increase ticket revenue for our 40-week season to \$3.8M in FY25.
2. Increase contributed income from individuals, foundations, corporations, and government to \$7.6M in FY25.
3. 100% of our 32 board members will give annually.

Objectives for Goal #2: Foster Artistic & Musical Innovation

1. In the next year, commission two new works by today's most exciting composers.
2. Appoint the Symphony's first Artist-in-Residence for the FY25 season.
3. Present 10 world renowned guest artists and guest conductors in our Classical Series Concerts.

Objectives for Goal #3: Advance Equity/Achieve an Inclusive, Diverse, Effective Organization

1. Participate in Year 3 of the Catalyst Fund Incubator, the League of American Orchestras' 3-year DEI program to help create a more equitable organizational culture.
2. Provide a minimum of two DEI Education training opportunities for all staff, musicians, and board members in FY25.
3. Diversify our orchestra by partnering with the Sphinx Organization, a national organization dedicated to transforming the lives of young Black and Latinx musicians, to hire a minimum of 10 musicians of color to play with the Jacksonville Symphony during concerts, providing them with mentoring and professional experience.

Objectives for Goal #4: Expand Music Education

1. Add a new music education opportunity that allows parents to participate in activities with their children.
2. Increase attendance to 1,200 students at each of four Youth Concerts and 2,500 students at each of two Nutcracker student matinees.
3. Increase the number of participants in the Jacksonville Symphony Youth Orchestra program by 10% in FY25.
4. Hire a new Music Director for the Jacksonville Symphony Youth Orchestras (JSYO) program.

Objectives for Goal #5: Increase Community Engagement

1. Present Free Community Concerts annually.
2. Expand access to community residents through Ensemble performances at 20 venues across greater Jacksonville.
3. Create discount ticket programs that increase patron access such as discounts for active and retired military, and families from underserved neighborhoods.

PROGRAM SCOPE OF WORK AND DELIVERABLES:

During our 40-week season, the Symphony contributes to the cultural vibrancy of our community by producing a new concert for residents each week featuring a variety of musical genres with broad appeal and providing access to music education programs for students on the First Coast.

Our 75th Anniversary Season of 92 concerts includes:

- **Special Events:**
 - Opening Night: Mahler's *Symphony No. 2* featuring operatic mega-stars Ailyn Perez and Isabel Leonard.
 - *Violins of Hope* concert featuring instruments once played by Holocaust victims during WWII.
 - Take 6, the GRAMMY Award winning gospel sextet.
 - A New Children's Music Festival: A unique 1-day event celebrating the joy of music to inspire children of all ages.
 - 75th Anniversary Season Gala
- **Classical Series:** 11 programs, 22 performances, including world premieres by new Artist-in-Residence Conrad Tao and composers Carlos Simon and Brittany J. Greene
- **Pops Series:** 10 programs, 23 performances featuring popular music from a variety of genres.
- **Symphonic Night at the Movies:** 3 films, 6 performances (*Harry Potter & Star Wars*) with scores played live by the orchestra.
- **Coffee Series:** 8 one-hour concerts at 11am on Fridays with reduced ticket prices
- **Symphony in 60:** Four 1-hour classical concerts on Thursdays preceded by a happy hour.
- **Jazz Series:** A 2nd season of Sunday afternoon jazz concerts
- **Organ Series:** 3 concerts featuring our historic 1914 Casavant organ.
- **Family Series:** Fun, family-friendly, low-cost concerts
- **Holiday Specials:** 6 Performances including *First Coast Nutcracker* and Handel's *Messiah*.
- **Community Concerts:** A free Community Open House concert, a free Donor Appreciation concert and ensemble performances at venues throughout the community such as libraries, senior communities and ArtWalk.

Music Education Programs include:

- 2 Nutcracker matinee performances and 4 Youth Concerts at Jacoby Symphony Hall for thousands of local students.
- Jacksonville Symphony Youth Orchestras: 190 young musicians in six ability levels rehearse each Sunday of the school year for 5 concerts in Jacoby Symphony Hall.
- Jump Start Strings: Free weekly instrument instruction from Symphony musicians for students at ten Title I afterschool programs.
- Ensemble School Visits by musicians at 40 local elementary schools
- Free Coffee Series tickets are provided to Title I high school students through our Students at the Symphony program.

PROGRAM COSTS/PAYMENT TERMS:

In FY25, the Jacksonville Symphony's operating expenses are projected to total \$13,502,326, including \$4,637,113 for salaries and benefits for 60 core musicians. FY25 funding sources include:

CONTRIBUTIONS:

- Individuals including
 - 32 Board members
 - Donors including Preston Haskell, Michael Ward, Lory Doolittle, Ann Hicks, Gilchrist Berg, JF Bryan, Monica Jacoby and Poppy Clements.
 - 1400 total households donate to the Jacksonville Symphony
- Corporations including
 - Florida Blue, VyStar, PNC, JP Morgan Chase, Deutsche Bank, Mayo Clinic and PGA TOUR
- Private Foundations including
 - Jessie Ball duPont Fund and DuBow Family Foundation

- External endowments and charitable trusts including
 - The J. Wayne and Delores Barr Weaver Music Education Fund
- 75th Anniversary Season special events (Opening Night and Gala)
- Local Government:
 - Cultural Council of Greater Jacksonville’s Cultural Services Grant Program
 - Cultural Council of Greater Jacksonville’s Capital Grant Program
- Please note: No State of Florida or Federal Funding in FY25

EARNED REVENUE:

- Ticket Sales – Subscription packages and single tickets
- Contracted Services/Touring Fees
- Endowment Distribution
- Education & Community Engagement
- Interest on Reserves

PROGRAM IMPACT & REPORTING:

Evaluation and Measurement: The Symphony will measure achievement of our Strategic Plan Goals and Objectives during the FY25 season in the following ways:

Goal 1: Acquire Resources for Financial Stability

- Monthly performance and financial reports to our Board of Directors
- Creation, management, and realization of \$13.5M operating budget by our senior leadership team.
- Establishment of annual fundraising goals along with detailed plans to accomplish those goals that will be tracked through Tessitura, our CRM system.
- The Marketing team will track ticket sales revenue, admissions, and examine household trend behaviors, including patron retention and total household spending through Tessitura.

Goal 2: Foster Artistic and Musical Innovation

- Perform world premieres of three new works, including two Jacksonville Symphony commissions.
- Positive reviews of artistic content by music critics and media coverage of the Symphony’s activities collected by PR staff.
- Solicited feedback such as patron surveys by our Marketing team.
- Unsolicited feedback from social media posts, website posts, and emails collected by our Marketing staff.

Goal 3: Advance Equity/Achieve an Inclusive, Diverse, Effective Organization

- A Zoom meeting at the conclusion of Year 3 of the Catalyst Incubator Fund DEI program to discuss accomplishments and challenges. Participants will include our CEO, VP & Chief Advancement Officer, VP of DEI, and Chair of the DEI Board Committee along with League of American Orchestras staff.
- Continued hiring of Black and Latinx Sphinx musicians by Orchestra Personnel Manager to reflect the make-up of our community on the Jacoby Symphony Hall stage.
- Reports by the DEI Board Committee on DEI efforts.

Goals 4 & 5: Expand Music Education and Increase Community Engagement

- Increased participation by children and adults in community engagement activities and music education programs through new partnerships and improved programming tracked by Education staff.
- Surveys of teachers and Jacksonville Symphony Youth Orchestras parents by education staff.

- Radio broadcasts of Symphony performances on WJCT Classical 24 89.9 HD2 on Sundays at 7pm for those who can't attend concerts in-person.
- Determine increase in new audiences reached, which will be calculated by cross-referencing current concert ticket sales against former ticket sales tracked by the Marketing team.

2023/24 Achievements:

- The Jacksonville Symphony is proud to report that 110,000 community residents benefited from attending in-person Symphony events, including 90 live concert performances and 13 education concerts during the 2023/24 season.
- The Development Department raised \$7.0M for the 2023/24 Annual Fund, while the Marketing Department's ticket sales revenue for the 2023/24 season totaled \$3.7M.
- FY25 Season Subscription package sales began on May 20 and totaled \$954,386 by June 30, almost \$170,000 more than the previous season's subscription sales by June 30, 2023.
- The Symphony's Classical Series featured two world premieres of Jacksonville Symphony commissions by composers Lowell Liebermann and Courtney Bryan, and a symphonic-staged opera production of Bizet's "*Carmen*" in April to critical acclaim with record attendance of 2,574 patrons.
- The Symphony partnered with the Sphinx Organization, a national organization in Detroit dedicated to transforming the lives of young Black and Latinx musicians through the power of diversity in the arts, to provide professional experience opportunities to musicians of color. The Symphony offered paid, full-time positions in the orchestra for the entire FY24 season to two Black Sphinx musicians and offered ten other Sphinx musicians the opportunity to be substitute players during FY24 concerts.
- The Symphony reached 70,873 students via our in-person and virtual music education programs in 2023/24, including students attending 117 Title I schools.

Residents Served and Program Impact:

The Jacksonville Symphony reaches over 130,000 Duval County residents through performances and music education programs annually.

The Jacksonville Symphony is the cultural heart of Northeast Florida and has a significant impact on our community as a cultural arts producer, economic driver, employer, and educator as these FY24 season impact statistics attest:

Cultural Arts Impact:

- During its 40-week season, the Symphony contributes to the cultural vibrancy of our community by producing a new concert for residents each week featuring a variety of musical genres with broad appeal: Classical, Opera, Jazz, Movies, Family and Pops concerts that include Broadway, Rock, Pop, R&B and Soul music.

Economic Impact:

- Based upon its \$12.5M year-end forecast in FY24, the Jacksonville Symphony's annual economic impact in Duval County is estimated at \$15.3 million according to the Arts & Economic Prosperity Calculator by Americans for the Arts.
- An estimated 90% of the Symphony's \$12.5M FY24 operating budget remained in Northeast Florida, contributing to the economic vitality of the area.
- With its 40-week season, the Symphony is the largest driver of business in Jacksonville's arts sector. More than 109,500 residents attended concerts in Jacoby Symphony Hall in FY24, patronizing downtown businesses for parking and dining out.
- The Symphony is the largest cultural arts organization in the city, employing 60 FT musicians and 40 FT staff who work in Duval County, pay taxes, and spend their salaries locally.
- The Symphony paid out services to more than 100 vendors, many of whom are local small businesses such as Kustura Technologies for IT support and Barr's Transportation for car services.

- According to the Jacksonville Chamber of Commerce, corporations, and residents new to the area consider the presence of the Symphony when deciding to relocate because of the cultural vibrancy and quality of life the Symphony provides.

Education Impact

- With nearly \$1 million earmarked for education and community engagement annually, the Symphony is the largest provider of music education in Duval County.
- More than 70,000 students participated in virtual and in-person education programs in FY24.

ADDITIONAL GRANT REQUIREMENTS AND CONDITIONS:

Recipient's expenditure of City funds for the Program and the provision of services shall be subject to Chapter 118, Parts 1 – 5 of the *Jacksonville Ordinance Code*, and the terms and conditions of any contract entered into between the City and Recipient. Recipient shall use the City funds for the Program in accordance with the City Council approved Term Sheet and Program budget. The City's Grant Administrator may amend this Term Sheet or the approved Program budget consistent with the Program's needs, provided that any substantial change to this Term Sheet or a budget change not within 10% of the attached Program budget line-items will require City Council approval.

FY 2025 City Grant - Complete Program Budget Detail

Lead Agency: Jacksonville Symphony Association, Inc.

Program Name: Operational Expenses

Agency Fiscal Year: July 1, 2024 - June 30, 2025

BUDGET

Categories and Line Items	Prior Year Prg Funding FY 2022-2023	Current Year Prg Budget FY 2023-2024	Total Est. Cost of Program FY 2024-2025	Funding Partners				
				Agency Provided Funding	All Other Program Revenues	City of Jacksonville (City Grant)	Federal/ State & Other Funding	Private Foundation Funding
I. Employee Compensation								
Personnel - 01201 (list Job Title or Positions no names)								
Core Musicians	\$ 3,294,885	\$ 3,423,690	\$ 3,558,270	\$ 2,347,898	\$ -	\$ 500,000	\$ 626,000	\$ 84,372
Extra Musicians	\$ 364,705	\$ 308,200	\$ 376,796	\$ 376,796	\$ -	\$ -	\$ -	\$ -
Stagehands	\$ 369,044	\$ 295,861	\$ 368,922	\$ 368,922	\$ -	\$ -	\$ -	\$ -
Artistic Planning	\$ 104,525	\$ 114,571	\$ 112,601	\$ 112,601	\$ -	\$ -	\$ -	\$ -
Conductors	\$ 336,261	\$ 346,684	\$ 360,965	\$ 360,965	\$ -	\$ -	\$ -	\$ -
Production Staff	\$ 322,991	\$ 350,648	\$ 356,131	\$ 356,131	\$ -	\$ -	\$ -	\$ -
Finance & Administration Staff	\$ 581,519	\$ 605,904	\$ 629,931	\$ 629,931	\$ -	\$ -	\$ -	\$ -
Development Staff	\$ 386,949	\$ 500,070	\$ 528,418	\$ 528,418	\$ -	\$ -	\$ -	\$ -
Education & JSYO Staff	\$ 206,662	\$ 218,621	\$ 242,512	\$ -	\$ -	\$ -	\$ -	\$ 242,512
Marketing & Patron Services Staff	\$ 515,574	\$ 531,837	\$ 535,866	\$ 535,866	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal Employee Compensation	\$ 6,483,116	\$ 6,696,086	\$ 7,070,412	\$ 5,617,528	\$ -	\$ 500,000	\$ 626,000	\$ 326,884
Fringe Benefits								
Payroll Taxes - FICA & Med Tax - 02101	\$ 464,783	\$ 484,872	\$ 525,368	\$ 506,816	\$ -	\$ -	\$ -	\$ 18,552
Health Insurance - 02304	\$ 747,618	\$ 654,545	\$ 789,970	\$ 773,875	\$ -	\$ -	\$ -	\$ 16,095
Retirement - 02201	\$ 349,993	\$ 330,297	\$ 430,364	\$ 425,864	\$ -	\$ -	\$ -	\$ 4,500
Dental - 02301	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Life Insurance - 02303	\$ 3,183	\$ 10,463	\$ 10,060	\$ 9,397	\$ -	\$ -	\$ -	\$ 663
Workers Compensation - 02401	\$ 86,717	\$ 77,500	\$ 63,293	\$ 63,293	\$ -	\$ -	\$ -	\$ -
Unemployment Taxes - 02501	\$ 28,997	\$ 36,000	\$ 30,000	\$ 30,000	\$ -	\$ -	\$ -	\$ -
Other Benefits - Disability	\$ 16,519	\$ 20,331	\$ 23,792	\$ 22,986	\$ -	\$ -	\$ -	\$ 806
Subtotal Taxes and Benefits	\$ 1,697,809	\$ 1,614,008	\$ 1,872,847	\$ 1,832,231	\$ -	\$ -	\$ -	\$ 40,616
Total Employee Compensation	\$ 8,180,925	\$ 8,310,094	\$ 8,943,259	\$ 7,449,759	\$ -	\$ 500,000	\$ 626,000	\$ 367,500
II. Operating Expenses								
Occupancy Expenses								
Rent - Occupancy - 04408	\$ 118,802	\$ 109,932	\$ 124,458	\$ 124,458	\$ -	\$ -	\$ -	\$ -
Telephone - 04181	\$ 32,711	\$ 33,000	\$ 33,000	\$ 33,000	\$ -	\$ -	\$ -	\$ -
Utilities - 04301	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Maintenance and Repairs - 04603	\$ 5,567	\$ 6,700	\$ 5,483	\$ 5,483	\$ -	\$ -	\$ -	\$ -
Insurance Property & General Liability - 04502	\$ 127,926	\$ 126,200	\$ 168,368	\$ 168,368	\$ -	\$ -	\$ -	\$ -
Security & House Personnel	\$ 351,366	\$ 372,500	\$ 371,998	\$ 371,998	\$ -	\$ -	\$ -	\$ -
Office Expenses								
Office and Other Supplies - 05101	\$ 500,949	\$ 287,082	\$ 345,308	\$ 275,308	\$ -	\$ -	\$ 70,000	\$ -
Postage - 04101	\$ 19,474	\$ 22,458	\$ 24,302	\$ 24,302	\$ -	\$ -	\$ -	\$ -
Printing and Advertising - 04801	\$ 685,442	\$ 734,865	\$ 1,003,692	\$ 1,003,692	\$ -	\$ -	\$ -	\$ -
Publications - 05216	\$ 57,843	\$ 39,307	\$ 42,232	\$ 42,232	\$ -	\$ -	\$ -	\$ -
Staff Training - 05401	\$ 51,398	\$ 15,057	\$ 7,500	\$ 7,500	\$ -	\$ -	\$ -	\$ -
Directors & Officers - Insurance - 04501	\$ 16,000	\$ 16,500	\$ 17,000	\$ 17,000	\$ -	\$ -	\$ -	\$ -
Professional Fees & Services (not audit) - 03410	\$ 437,272	\$ 346,527	\$ 427,650	\$ 427,650	\$ -	\$ -	\$ -	\$ -
Background Screening - 04938	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other - Equipment under \$1,000 - 06403	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Miscellaneous Production Expenses	\$ 36,353	\$ 26,597	\$ 32,400	\$ 32,400	\$ -	\$ -	\$ -	\$ -
Travel Expenses								
Local Mileage - 04021	\$ 73,437	\$ 67,793	\$ 97,820	\$ 97,820	\$ -	\$ -	\$ -	\$ -
Parking & Tools - 04028	\$ 125,859	\$ 157,039	\$ 148,850	\$ 148,850	\$ -	\$ -	\$ -	\$ -
Equipment Expenses								
Rental & Leases - Equipment - 04402	\$ 289,517	\$ 278,166	\$ 292,853	\$ 292,853	\$ -	\$ -	\$ -	\$ -
Vehicle Fuel and Maintenance - 04216	\$ 6,735	\$ 5,894	\$ 9,325	\$ 9,325	\$ -	\$ -	\$ -	\$ -
Vehicle Insurance - 04502	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other - (Please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Client Expenses - 08301								
Client Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Client Utilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Client Food	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Client Medical	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Client Educational	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Gala Expense	\$ 155,548	\$ 150,000	\$ 250,000	\$ 250,000	\$ -	\$ -	\$ -	\$ -
Guest Artist Fees & Travel	\$ 759,696	\$ 825,029	\$ 1,039,278	\$ 1,039,278	\$ -	\$ -	\$ -	\$ -
Music License, Rental & Purchase	\$ 119,609	\$ 112,030	\$ 117,550	\$ 117,550	\$ -	\$ -	\$ -	\$ -
Total Operating Expenses	\$ 3,971,506	\$ 3,732,676	\$ 4,559,067	\$ 4,489,067	\$ -	\$ -	\$ 70,000	\$ -
III. Operating Capital Outlay (OVER \$1,000)								
Machinery & Equipment - 06402	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Computers & Software - 06427	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other - (Please describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Capital Outlay	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Expenses Total	\$ 12,152,430	\$ 12,042,770	\$ 13,502,326	\$ 11,938,826	\$ -	\$ 500,000	\$ 696,000	\$ 367,500
Percent of Budget				88.4%	0.0%	3.7%	5.2%	2.7%

Last Modified: 07/08/2024

All City Grant Items listed must be included in the narrative section of the budget.

**Budget Narrative for Selected Items of Cost
FY 2025 City Grant Application
Program Budget Narrative (Max. 2 Pages)
Proposed Funding Period: FY 2024-2025
COJ Funding Only**

Agency: Jacksonville Symphony Association, Inc.

Program Name: Operational Expenses

EXPENSES: Please provide narrative description for all categories listed below for which you are seeking **City Funding Only**.

We have included those required elements in the spaces below. See instructions when listing personnel expenses.

Please feel free to add additional lines as necessary to provide explanations using the line insert feature.

I. Employee Compensation - (not related to costs of the office of the governor of a state or the chief executive of a political subdivision)

Salary & Wages

60 Core Musicians	\$500,000
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BUDGET NARRATIVE

The Jacksonville Symphony's core orchestra is made up of 60 full-time musicians who are union members of AFM Local 444. In November 2023, The Jacksonville Symphony and its musicians agreed upon a four-year contract extension beginning with the 40-week FY25 season. 100% of the City Grant will be used in support of the \$4,637,113 musicians' salaries & benefits budget line item.

The Symphony can't achieve its mission to enrich the human spirit through Symphonic music without our musicians. They are integral to every Jacksonville Symphony performance, event, and music education program presented during our season.