



Nonprofit Organization Development Plan FYC 6421:  
Nonprofit Organizations  
Dr. Kumaran

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## **Section 1: Rationale**

### **Issue Statement**

The population of the United States is aging. The population of older Americans is one of the fastest-growing demographic groups in the country (ACL, 2017). It is projected that by the year 2030, one in five Americans will be at least 65 years old (Colby, Ortman 2014). It is unclear whether the current benefit systems for older adults, including Social Security and Medicare, will be able to match the potential burden placed on the healthcare system by an aging population (Goss, 2017). Thus, it is a major public health issue to develop strategies to help keep this large group of aging Americans as healthy as possible, for as long as possible. There is strong evidence that continued social inclusion and connectedness of older adults is important for preserving mental and physical health (Seppälä, 2012).

At the same time, the younger generation of Americans have also undergone a paradigm shift. The current generation of children are growing up with different levels of social interaction and exposure to new hobbies and skills. There has been a dramatic increase in the amount of time a child spends playing video games and watching television (Pew, 2015). Increased screen time poses threats to physical health and limits the amount of time a child spends socializing with other children and adults (Luscombe, 2014). Children are spending more time alone and thus, miss out on opportunities learning social cues, empathy, and communication skills. Additionally, the current transition to a STEM (science, technology, engineering, mathematics) focused K-12 education system has forced schools to cut resources for music, arts, and other trades programs (NAA, 2016). It is not realistic that every child is able to participate in extracurricular programs due to financial and temporal constraints.

It is critical that we recognize the dichotomy of issues in America today. There is an impending issue of promoting healthy aging for a large population of older Americans. At the same time, it is important that we provide social support and opportunities for a well-balanced upbringing for youth in America.

### **Needs Assessment**

The need to connect people has never been more imminent. In a recent study, over 25% of Americans reported having no valuable social connections (Seppälä, 2012). A 2016 assessment of needs in Alachua County, Florida calls for increased services for older adults, specifically those that will improve quality of life (Well Florida Council, 2016). Childcare and extracurricular programs outside of school are not accessible by everyone in the Alachua County community due to high associated cost (Well Florida Council, 2016). A recent national study assessing indicators of childhood well-being indicated that depression rates have increased in the past 10 years have increased and rates of physical activity have decreased (Forum on Child and Family Statistics, 2017). Two vulnerable populations, children and older adults, are experiencing similar obstacles that hinder social and emotional growth and success. Yet, there remains a need for a public health initiative in Alachua County that involves the psychological well-being of both children and older adults.

It is time to bridge the gap. Maintaining social connections, quality relationships, and lifelong learning have been shown to decrease anxiety and depression, increase self-esteem, preserve brain function, and increase life expectancy (Seppälä, 2012). With over 20% of adults in Florida are over the age of 65, the aging population represents an untapped societal resource (AoA, 2016). Older adults have life experiences with potential to impart practical wisdom, new skills

and hobbies, and positive values on youth in need of social engagement. There are some nonprofit organizations and programs in Alachua County to address senior well-being and childhood well-being individually. There are currently no programs in the Alachua County community specifically focused on connecting older adults and help children to broaden their hobbies and interests in addition to providing a sense of purpose and a social outlet for older adults. Programs and services will include academic mentoring, skill and trade education, and group volunteering events.

### **Additional Rationale**

There are nonprofits in Alachua County that only address care for older adults and nonprofits that only address childhood learning and development. There are no nonprofits that address the needs of both populations. The most prominent services for older adults in the community is ElderCare of Alachua County. This organization provides congregate meal services, fitness classes, and social activities for community members over age 60 (ElderCare, 2018). ElderCare also operates a senior recreation center for older adults to gather and socialize. ElderCare reports that there is a high level of participation in programs and that congregate meal times serve as an opportunity for older adults, who would otherwise be isolated, to socialize over a shared meal. Additionally, Boys & Girls Club of Alachua County and local Boy Scout and Girl Scout troops offer programs for youth engagement. Boys & Girls Club serves primarily as an afterschool program that offers arts & crafts, reading, and physical activity programs for ages K-12 (Boys and Girls Club, 2018). Boy Scouts and Girl Scouts programs involve youth in outdoor adventure programs, skill building, leadership development and volunteering projects (Boy Scouts of America, 2018, Girl Scouts, 2018). Participation Boy Scots and Girl Scouts comes with

an associated membership fee. Boys & Girls Club, Boy Scouts, and Girl Scouts do not publish information about the outcomes or success of their programs.

At the national level, there are a few models of successful mentoring programs. Across Ages is a nonprofit organization with 50 sites in Philadelphia, Pennsylvania (Across Ages, 2018). Older mentors are paired with at-risk middle-school aged youth. Topics of mentorship include abstinence from drug use, working on homework, going to sporting events, or working on community service projects together. Evaluation of the Across Ages program showed that students who participated in regular mentorship activities had a greater rate of abstinence from drugs and increased school attendance.

Bridge the GAP will fulfill the need for an intergenerational mentorship program in the community by:

- Connecting youth in the community with suitable and compatible older adult mentors
- Engaging mentors and mentees in programs to increase academic success
- Hosting community service projects for all mentor-mentee groups to participate
- Providing new skill and hobby development programs taught by older adults
- Organizing monthly family events for youth, family and their mentors

There are many positive outcomes as a result of intergenerational mentoring programs (University of Wisconsin, 2016). The framework of Bridge the GAP programs has the potential to increase an older adult mentors' sense of self-esteem and accomplishment while reducing social isolation (University of Wisconsin, 2016). Children who engage in an intergenerational mentorship program have been shown to have a respectful attitude towards older adults, higher academic achievement, reduced delinquent behavior and improved social skills



(University of Wisconsin, 2016). Bridge the GAP will preserve an oral history through storytelling and interacting in shared experiences. Bridge the GAP wants future generations to learn valuable, practical skills from older adults. Activities such as cooking, playing a musical instrument, arts & crafts, and sewing are not always taught in schools. We will connect knowledgeable older adults with children to ensure these valuable skills are passed along.

If Bridge the GAP does not exist, older adults and children will not be connected in a meaningful mentor-mentee relationship. The health and quality of life for older adults in Alachua County will be jeopardized and may decline more rapidly, thus placing burden on the community healthcare system. Children will miss out on opportunities for social growth and learning valuable skills and hobbies. Bridge the GAP represents an efficient method to meet the needs of children and older adults in the community. It is in the best interest of the community to preserve societal wisdom through intergenerational mentorship.

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## Section 2: Organizational Concept

### Mission Statement

The mission of Bridge the GAP is to empower youth and elderly adults through mutually beneficial experiences focused on practical skill building, academic improvement, and socialization. Bridge the GAP believes that individuals of all ages are valuable members of society.

### Vision Statement

Bridge the GAP has a vision to create a society that prioritizes meaningful intergenerational partnerships so that everyone feels they have a place and purpose in life.

### Core Values Statement

Bridge the GAP holds core values to support the organizational mission to promote a mutually beneficial intergenerational mentorship program. We believe it is important to:

- *Respect* others at all times and the different circumstances we may have experienced in life.
- *Celebrate* our individually unique talents, personalities, and attributes.
- *Pursue growth* and learning at all stages in life.
- *Include* all members of the community.
- Build *honest* and successful relationships through open-communication.
- *Discover* a new passion- it is never too late to grow!

- *Connections* are important. We want to bring talented individuals together for the improvement of our community.

### **Five Year Prospective Organizational Goals**

- Identify and recruit older adults in the participate as mentors.
- Identify and recruit children and youth in the community to participate as mentees.
- Secure sites throughout the community to host mentor/mentee meetings and workshops.
- Connect youth with suitable and compatible older adult mentors.
- Create a framework dialogue for mentors in to use when counseling youth for academic success.
- Host monthly community service projects for all mentor-mentee groups to participate.
- Provide opportunities and workshops for youth to learn new skill and hobby development programs taught by older adults.
- Organize and host monthly family social events for youth, family and their mentors.
- Create partnerships with other providers in the community, including the Alachua County School District, ElderCare of Alachua County, Alachua County Library System, and more.
- Evaluate success of organization and assess areas for opportunity and improvement

## **Uniqueness of the Organization**

The main role of Bridge the GAP is to connect youth and older adults in Alachua County, Florida in order to enhance quality of life, social skills, and youth outcomes. Bridge the GAP will accomplish this goal by providing an intergenerational mentorship program for older adults and children in the community. The priority of Bridge the GAP is unique because it is the only program in the region focused on making a meaningful connection between people at two very different stages of life.

Most intergenerational mentorship programs focus on mentorship of low income or at-risk youth. There are not many programs open to all children. Bridge the GAP will be inclusive of all type of people, regardless of race, ethnicity, religion, or socioeconomic background. Bridge the GAP believes personal growth comes from interacting with people who may be different from you.

This organization will be sensitive to interpersonal differences and make thoughtful mentor-mentee pairs. Mentors and mentees will be paired by personality traits, hobbies, interests, cultural background, and religious background. It is important to establish an environment of trust, security, and mutual understanding in order for the mentorship relationship to be as successful as it can be.

Unlike other community-based programs for youth and older adults, Bridge the GAP will design and facilitate specific programs that serve the unique individual interests of the mentorship pairs. The mentor meetings will take place in community centers, libraries, and schools. Bridge the GAP will continue to encourage academic counseling, life skills counseling, and training for other hobbies and trades. But, Bridge the GAP understands that older adults

bring a unique expertise and are encouraged to share their own talents with their mentee. Additionally, if a child has a desire to learn a specific skill, they will be matched with an older adult who can teach them that skill.

Bridge the GAP is passionate about building connections between generations in order to strengthen the community and safeguard its success.

## **Section 3: Governance**

### **Board Development**

#### **Board Roles**

Bridge the GAP Board of Directors will be responsible for leadership, policymaking, fiduciary, and ethical oversight of the organization in pursuit of its mission and activities. The Board will also be responsible for determining the appropriate candidate to serve as executive director of Bridge the GAP. The Board will work together and on committees to effectively and efficiently perform duties that will incorporate sustainability measures, employee inclusivity, and governance. All Board members are expected to contribute gifts of time and money in order to support Bridge the GAP programs and activities. The Board will evaluate the progress of Bridge the GAP activities and financial affairs and make important decisions to further the organizational mission and vision. It is critical for the Board of Directors to be independent, unbiased and make decisions for the betterment of the organization.

#### **Characteristics of Board Members**

The Board of Directors will be comprised of a minimum of 13 individuals and no more than 20 members. These members must be adults over the age of 18 and live in Alachua county or in the north central region of the state of Florida and be willing to travel to attend Board meetings. Board members must be qualified and have a vested interest in the organization. Bridge the GAP serves a diverse population and as such, seeks diverse members of the community to serve on the Board. The Board will include a diverse group of genders, ethnicities, professions, ages, and cultural backgrounds. The Bridge the GAP Board will make

strategic decisions for the organization and therefore must be informed and understand the interests of diverse stakeholders. In order to assess Board composition, Bridge the GAP will utilize a Board matrix and track details including, age, gender, ethnicity, and profession.

The Board will ideally be composed of members with expertise, affluence, and influence. A variety of professionals will serve on the Board and contribute their respective expertise. Diverse perspectives will serve to strengthen the Board and the organization. Specifically, members with experience in childhood education and community organizing will be invaluable when advising on appropriate mentoring methods and curriculum for Bridge the GAP programming. Additionally, a financial expert can provide counsel in financial oversight and budgeting decisions. A legal expert can provide guidance during legal disputes, contract drafting, and ethical issues. A mental health expert can assist with identifying appropriate counseling and mentoring methods and provide guidance with personnel or participant specific dilemmas. A PR and marketing expert will be needed to contribute to community marketing strategies and help launch social media campaigns, especially in advance of fundraising events. During the hiring and on-boarding process, each new Board members will be asked what they can give to the organization and if they are willing to give. It is important for Board members to contribute their time and talents in a mutually beneficial setting, where the organization receives expert guidance and the Board member contributes to a meaningful cause.

The Board of Directors will meet in-person on a quarterly basis. All Board members are required to be in attendance. Absence from two or more Board meetings is cause for dismissal from the Board. Additionally, Board members are expected to give back to Bridge the GAP through volunteer time and financial support. Attendance to fundraising events and at least 4



mentor-mentee meetings will enhance each Board member's ability to provide informed, contextual guidance to the organization. Above all, Board members must set the tone for the organization as kind, honest, and hard-working professionals who act with integrity to further the mission of Bridge the GAP.

### **Duties and Responsibilities of the Board**

The Board of Directors for Bridge the GAP holds many important responsibilities. One general duty of the Board is to engage, energize and motivate from within its own members in order to ensure continued service and involvement. (Kumaran, 2018) Additionally, the Board holds specific legal duties that include the duty of care, the duty of loyalty, and the duty of obedience. (Renz, 2016) The Board is entrusted with leading and guiding the organization through policy and logistic decisions. As such, the duty of care refers to the necessity for Board members to make prudent decisions, act diligently and thoughtfully, and actively participate in the decision-making process. (Renz, 2016) Additionally, the duty of loyalty is the expectation for all Board members to act in the best interest of the organization, as opposed to serving individual goals or interests. Any and all conflicts of interest in organization activities must be disclosed outright. Documentation of conflict of interests for each Board member will be reported and accessible for the public to access in such a case where Board activities are in question. The duty of obedience sets the standard for all Board members to act in accordance of Bridge the GAP values, bylaws, policies and perform activities that further the mission and vision. Fiduciary responsibilities of the Board include creating and implementing policies to govern the use of financial resources, establishing and approving an annual budget, developing monitoring systems for spending and use of resources, monitoring and assessing fiscal position, and

implementing an audit or external review (Renz, 2016). The Board holds other governing responsibilities including, but not limited to (Renz, 2016):

- Providing leadership and strategic direction for the organization
- Establishing policies and procedures
- Resource management
- Utilization of resources in an effective and efficient manner
- Providing support and feedback for the executive director
- Establish relationships with the community constituents and stakeholders
- Act in accountable and ethical manner
- Engage and motivate other Board members to ensure the highest level of performance

Finally, the Board is responsible for igniting motivation for fundraising and re-energizing prior donors to give again. The Board has freedom to develop creative strategies for fundraising. However, the Board must continually evaluate and assess the financial affairs of the organization and will need to mobilize resources through fundraising in order to further the goals, mission and vision of Bridge the GAP.

### **Recruitment Strategies and Orientation**

In order to develop and operate with a successful Board, recruitment strategies must be tailored to select the right people for the job. (Renz, 2016) Recruitment and selection of Board member should focus on locating thoughtful, systematic, and disciplined members. (Renz, 2016). Above all, Board members must be qualified, have passion for the organization's mission, and be willing to contribute time, talents, and resources to the organization.

Additionally, the Board should seek to recruit diverse members from a variety of work

environments. Board positions will be advertised through word of mouth within the network of current board members in addition to being posted on the Bridge the GAP website and the Nonprofit Center of Northeast Florida website.

Interested individuals are invited to apply through the organization website. If candidate is deemed appropriate and qualified through an initial screening process, the candidate will be provided with information about the bylaws, expectations, roles, and responsibilities of all Bridge the GAP Board members. Once a candidate is informed about meeting requirements, meeting dates, and all expectations, they will be invited to complete the onboarding process. The onboarding and orientation process involve legal proceedings, including a statement of conflicts of interest, and contractual agreement to fulfill all legal and fiduciary responsibilities of the board. The new Board member will be provided with all documentation and information in order to make an informed commitment to serve. Once the onboarding paperwork is completed, the new Board member will meet in a formal setting with the current Board members and the executive director. There will be time for the new member to ask questions, explain personal goals and interests for serving on the Board, and to get to know the other Board members. A formal vote among the current Board members will then take place. A simple majority vote is required in order to formally vote the new Board member in to serve. Once voted in, the new Board member will provide a pledge to serve and will be officially sworn in. Orientation will directly follow and will include meetings with employee to go over the organization's history, mission, and programs. The employees will also share their goals with the new Board member. The Human Resources/Finance Director will meet with the new Board member to discuss logistics and opportunities for growth. The onboarding and orientation

process should be completed within 60 days of initial application to serve as a Board member. Bridge the GAP seeks to engage passionate and qualified candidates to serve on the Board of Directors in an efficient and effective manner.

## **Description of the Board**

### **Size of the Board**

The Bridge the GAP Board of Directors must have a minimum of 13 members and a maximum of 20 members. Each member will serve a two-year term and will be limited to serving 3 consecutive terms.

### **Board Meetings**

The Board of Directors will meet on a quarterly basis at the Bridge the GAP office. All Board members are required to attend in-person meetings and contractually agree to meet in-person during the onboarding and orientation process. All Board members will receive a minimum of two weeks' notice of an upcoming meeting. Ideally, all members will receive a notice of the time, date, and location of the following Board meeting one month prior. The Board meetings will generally occur in February, May, September, and November. All Board meetings are an approximately two hours. An annual Board member retreat will be held in Gainesville, FL on the University of Florida campus during a weekend in the month of January. Board members are required to attend and participate in strategic planning, goal setting, resource assessment, and team building activities designed to reignite passion and direction for serving as leaders of Bridge the GAP. The Board will develop an advocacy plan, a fundraising plan, review employee actions, and engage in the ten-step strategic planning process during the retreat. (Renz, 2016)

The Board Chair will organize and direct the Board meetings. Quorum must be established at the start of every Board meeting, of which seventy percent of Board members must be present. If quorum is not reached, no agenda measures may be voted on until the next meeting. It is critical for all members to be in attendance in order to ensure timely progress of Board initiatives. Board meetings will be conducted in an organized and efficient manner. The Chair will begin by reviewing the previous meeting minutes and will report official business. The committee chairs will follow by providing a brief summary of their reports and provide written, hard copies for all other Board members to follow along and review. The spokesman from the following committees will give reports:

- Executive committee
- Fundraising committee
- Finance committee
- Personnel and program committee

Refer to Bylaws Article IV to review each of the specific committee roles and responsibilities. After official Board business is reviewed, the executive director is invited to share a report of the past quarterly activities, evaluation results, and progress toward organizational missions. Open discussion is encouraged in order to assess the status of operations and employee performance. The executive director is also invited to share the program impacts and success stories of the organization in order to provide tangible evidence of the role of Bridge the GAP in the Alachua County community.

All Board meeting activity will be recorded by the Secretary and issued to Board members and employees for review within one week of the meeting. The Chair is responsible for sending out

notice of upcoming Board meetings. Committees may meet per diem. Attendance and participation of all Board members is vital for organizational success.

### **Officers of the Board and Position Descriptions**

It is required that nonprofit organizations elect officers of the Board. At Bridge the GAP, the officers of the Board include the Chair, the Secretary, and the Treasurer. These three officers form the leadership team of the Board and serve on the Executive Committee.

The Chair is the chief member of the Board of Directors and Bridge the GAP at-large. The Chair is responsible for organizing the Board, conducting quarterly Board meetings, and reporting on general business at each meeting. The Chair should lead by example and exhibit passionate, diligent, and honest leadership. The Chair will also review each Board member's performance at the annual Board retreat in order to enhance professional development and Board member commitment. The Chair should be accessible for all Board members to voice concerns, ideas, and general thoughts about the status of the organization in order to enhance Board member satisfaction.

The Secretary is responsible for documenting all actions at each Board meeting and writing a report to be issued to all members after each Board meeting. The Secretary maintains all official documents of the Board.

The Treasurer works with the Finance Committee and the Bridge the GAP Human Resources/Finance Director. The Treasurer records and maintains financial reports and stay up to date on accounts and expenses. The Treasurer is responsible for overseeing the annual financial report and the annual budget development and approval.

## **Board Committees**

Bridge the GAP Board of Directors has four committees: The Executive Committee, the Finance Committee, the Fundraising Committee, and the Personnel and Programs Committee. Each committee should be composed of a minimum of two Board members and are permitted to meet as necessary to complete their designated roles and responsibilities.

The Executive Committee is composed of the Chair, the Secretary, and the Treasurer. Except for the power to amend the articles of incorporation and bylaws, the Executive Committee shall have the authority to act on behalf of Board of Directors in the intervals between meetings of the Board of Directors and is suited to address organizational emergencies. The Executive Committee is recommended to meet at least two weeks prior to the quarterly Board meeting to develop the agenda and make strategic decisions for the organization to be announced at the next meeting.

The Finance Committee plans, oversees, and monitors the use of financial resources. This committee will work closely with the auditing team and synthesize information from the Evaluation Team to determine the appropriate allocation of resources within the organization. Additionally, the Finance Committee and the Treasurer will work together to develop an annual financial report.

The Fundraising Committee is responsible for coordinating with employees and staff of the organization to develop, strategize, and implement all philanthropic events. The Fundraising Committee can provide direct or indirect support to organization employees. All actions must be reported to the Board of Directors at each meeting.

The Personnel and Programs Committee works closely with the Human Resources/Financial Director to organize and oversee appropriate human resources activities and employee satisfaction. Additionally, this committee can provide support in working with community stakeholders and can give direction when developing or refining programs.

### **Executive Director and Relationship to the Board**

The Executive Director of Bridge the GAP provides organizational leadership for the employees and participants in programming. The Executive Director is in charge of overseeing the daily operations and helps to strategize and prioritize tasks with Bridge the GAP staff. (Kumaran, 2018) The Executive Director acts as a liaison between the Board of Directors and the organization staff to integrate broad policies and procedures with daily operations and ensures that the two are conducted in parallel and in the best interest of the overall mission and vision of Bridge the GAP. The relationship between the Executive Director and the Board of Directors is critical for organization success. (Kumaran, 2018) This relationship must be honest, open, and respectful in order to reach optimal efficiency and effectiveness.

First and foremost, the Board of Directors is responsible for recruiting, selecting, and hiring a candidate who is qualified and fit to serve to their fullest capacity in the role of Executive Director. (Renz, 2016) The Board of Directors will work with an Executive Director during the orientation and training process to ensure a seamless transition of power and to instill the organizational values in the new Executive Director. The Executive Director will attend all quarterly Board Meetings and report on daily operations and advocate for programmatic policy changes and resource allocation. The Board is responsible for evaluating performance and providing feedback to the Executive Director. The Board must also place trust in the Executive



Director and avoid getting involved in the minutia. (Renz, 2016) The Board is a source of guidance, policy making, and counsel for broad issues or issues that bear importance in determining the direction of the organization. The Board should clearly outline their expectations for the Executive Director and allow room for the Executive Director to perform with a degree of independence. The Board of Directors will hold the Executive Director accountable in ethical, legal, and financial issues. (Renz, 2016) Overall, a professional, well-maintained relationship between the Board of Directors and the Executive Directors is crucial for consistently positive leadership.

### References for Section 3: Governance

Kumaran, M. (2018) Module 3: *Founding Blocks of a Nonprofit Organization II* [PDF]. Retrieved from <https://ufl.instructure.com/courses/357626/pages/week-3-founding-blocks-of-a-nonprofit-organization-2>

Renz, D. O., & Herman, R. D. (2016). *The Jossey-Bass handbook of nonprofit leadership and management*. Hoboken, NJ: Jossey-Bass, A Wiley brand.

Kumaran, M. (2018) Module 6: *Leadership and Human Resources Management* [PDF]. Retrieved from <https://ufl.instructure.com/courses/357626/pages/week-6-leadership-and-human-resources-management>

## **Section 4: Governing Documents**

### **ARTICLES OF INCORPORATION**

In compliance with Chapter 617, F.S., (Not for Profit)

#### **ARTICLE I**

##### **BRIDGE THE GAP, INC.**

###### **1.01 Name**

The name of this corporation shall be **Bridge the GAP, Inc.** The business of the corporation may be conducted as **Bridge the GAP, Inc.** or **Bridge the GAP.**

#### **ARTICLE II**

##### **DURATION**

###### **2.01 Duration**

The period of duration of the corporation is perpetual.

#### **ARTICLE III**

##### **PURPOSE**

###### **3.01 Purpose**

Bridge the GAP is a non-profit corporation and shall operate exclusively for charitable purposes within the meaning of Section 501 (c)(3) of the Internal Revenue Code, or the corresponding section of any future Federal tax code. Bridge the GAP's purpose is to empower youth and elderly adults through mutually beneficial experiences focused on practical skill building, academic improvement, and socialization. We provide opportunities for intergenerational mentoring and educational workshops for children.

###### **3.02 Public Benefit**

Bridge the GAP is designated as a public benefit corporation.

#### **ARTICLE IV**

##### **NONPROFIT NATURE**

###### **4.01 Non-profit Nature**

Bridge the GAP is organized exclusively for charitable purposes including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501 (c) (3) of the Internal Revenue Code, or corresponding section of any future federal tax code. Bridge the GAP is not organized and shall not be operated for the private gain of any person.

###### **4.02 Personal Liability**

No officer or director of this corporation shall be personally liable for the debts or obligations of Bridge the GAP of any nature whatsoever, nor shall any of the property or assets of the officers or directors be subject to the payment of the debts or obligations of this corporation.

###### **4.03 Dissolution**

Upon termination or dissolution of the Bridge the GAP, any assets lawfully available for distribution shall be distributed to one (1) or more qualifying organizations described in Section 501(c)(3) of the Internal Revenue Code of 1986 (or described in any corresponding provision of any successor statute). The organization to receive the assets of the Bridge the GAP hereunder shall be selected by the discretion of a majority of the managing body of Bridge the GAP.

**ARTICLE V**  
**BOARD OF DIRECTORS**

**5.01 Governance**

Bridge the GAP shall be governed by its board of directors.

**5.02 Initial Directors**

The initial officers of the board of directors of the corporation shall be Isabella Herb, Chair, Owen Wilde, Secretary, and Robert Gemmill, Treasurer. Board members are elected by a majority vote.

**ARTICLE VI**  
**MEMBERSHIP**

**6.01 Membership**

Bridge the GAP shall have no members. The management of the affairs of the corporation shall be vested in a board of directors, as defined in the corporation's bylaws.

**ARTICLE VII**  
**AMENDMENTS**

**7.01 Amendments**

Any amendment to the Articles of Incorporation may be adopted by approval of two-thirds (2/3) of the board of directors.

**ARTICLE VIII**  
**ADDRESSES OF THE CORPORATION**

**8.01 Corporate Address**

The mailing address of the corporation is: 3500 SW 19<sup>th</sup> Ave, Gainesville, FL, 32607.

**ARTICLE IX**  
**APPOINTMENT OF REGISTERED AGENT**

**9.01 Registered Agent**

The registered agent of the corporation shall be: Michael Shoemaker, Esquire, 1234 Garden Street, Tampa, Florida, 33627

**ARTICLE X**  
**INCORPORATOR**

The incorporators of the corporation are as follows: Kelsey Gemmill, 11918 Mandevilla Court, Tampa, Florida, 33626.

### **Certificate of Adoption of Articles of Incorporation**

We, the undersigned, do hereby certify that the above stated Articles of Incorporation of Bridge the GAP were approved by the board of directors on Monday, December 3, 2018 and constitute a complete copy of Articles of Incorporation of the Bridge the GAP, Inc.

Names, addresses and signatures of all directors and incorporators.

### **Acknowledgment of consent to appointment as registered agent**

I, Michael Shoemaker, agree to be the registered agent for Bridge the GAP as appointed herein.

Registered Agent: Michael Shoemaker

Date: 12/3/18

## BYLAWS OF **BRIDGE THE GAP** ARTICLE I — NAME AND PURPOSE

### *Section 1- Name*

The name of the organization shall be Bridge the GAP. It shall be a nonprofit organization incorporated under the laws of the State of Florida.

### *Section 2- Purpose*

Bridge the GAP is organized exclusively for charitable and education purposes.

**The purpose of this corporation is:**

- **to empower youth and elderly adults through mutually beneficial experiences focused on practical skill building, academic improvement, and socialization.**

## ARTICLE II — MEMBERSHIP

### *Section 1- Membership*

Membership shall consist of the board of directors.

## ARTICLE III — BOARD OF DIRECTORS

### *Section 1- Board role, size, and compensation*

The board is responsible for overall policy and direction of the association, and delegates responsibility of day-to-day operations to the staff and committees. The board shall have up to 20, but not fewer than 13 members. The board receives no compensation other than reasonable reimbursement for organizational related expenses.

### *Section 2- Terms*

All board members shall serve two-year terms, but are eligible for re-election for up to three consecutive terms.

### *Section 3- Meetings and notice*

The board shall meet at least quarterly, at an agreed upon time and place. An official board meeting requires that each board member have written notice at least two weeks in advance. An annual Board retreat will take place following the final meeting of the year.

#### *Section 4- Board elections*

During the last quarter of each fiscal year of the corporation, the board of directors shall elect Directors to replace those whose terms will expire at the end of the fiscal year. This election shall take place during a regular meeting of the directors, called in accordance with the provisions of these bylaws.

#### *Section 5- Election procedures*

New directors shall be elected by a majority of directors' present at such a meeting, provided there is a quorum present. Directors so elected shall serve a term beginning on the first day of the next fiscal year.

#### *Section 6- Quorum*

A quorum must be attended by at least seventy percent of board members for business transactions to take place and motions to pass.

#### *Section 7- Officers and Duties*

There shall be four officers of the board, consisting of a chair, vice-chair, secretary and treasurer. Their duties are as follows:

- *The Chair* shall convene regularly scheduled board meetings, shall preside or arrange for other members of the Executive Committee to preside at each meeting in the following order: vice-chair, secretary, treasurer.
- *The Secretary* shall be responsible for keeping records of board actions, including overseeing the taking of minutes at all board meetings, sending out meeting announcements, distributing copies of minutes and the agenda to each board member, and assuring that corporate records are maintained.
- *The Treasurer* shall make a report at each board meeting. The treasurer shall chair the finance committee, assist in the preparation of the budget, help develop fundraising plans, and make financial information available to board members and the public.

#### *Section 8- Vacancies*

When a vacancy on the board exists mid-term, the secretary must receive nominations for new members from present board members two weeks in advance of a board meeting. These nominations shall be sent out to board members with the regular board meeting announcement, to be voted upon at the next board meeting. These vacancies will be filled only to the end of the particular board member's term.

#### *Section 9- Resignation, termination, and absences*

Resignation from the board must be in writing and received by the secretary. A board member shall be terminated from the board due to excess absences, more than two unexcused

absences from board meetings in a year. A board member may be removed for other reasons by a three-fourths vote of the remaining directors.

*Section 10- Special meetings*

Special meetings of the board shall be called upon the request of the chair, or one-third of the board. Notices of special meetings shall be sent out by the secretary to each board member at least two weeks in advance.

ARTICLE IV — COMMITTEES

*Section 1- Committee formation*

The board may create committees as needed, such as fundraising, housing, public relations, data collection, etc. The board Chair appoints all committee chairs.

*Section 2- Executive Committee*

The three leadership officers serve as the members of the Executive Committee. Except for the power to amend the articles of incorporation and bylaws, the Executive Committee shall have all the powers and authority of the board of directors in the intervals between meetings of the board of directors and is subject to the direction and control of the full board.

*Section 3- Finance Committee*

The treasurer is the chair of the Finance Committee, which includes three other board members. The Finance Committee is responsible for developing and reviewing fiscal procedures, fundraising plan, and annual budget with staff and other board members. The board must approve the budget and all expenditures must be within budget. Any major change in the budget must be approved by the board or the Executive Committee. The fiscal year shall be the calendar year. Annual reports are required to be submitted to the board showing income, expenditures, and pending income. The financial records of the organization are public information and shall be made available to board members and the public.

*Section 4- Fundraising Committee*

This committee is responsible for coordinating with employees and staff of the organization to develop, strategize, and implement all philanthropic events. The Fundraising Committee can provide direct or indirect support to organization employees. All actions must be reported to the Board of Directors at each meeting.

*Section 5- Program and Personnel Committee*

This committee works closely with the Human Resources/Financial Director to organize and oversee appropriate human resources activities and employee satisfaction. Additionally, this committee can provide support in working with community stakeholders and can give direction when developing or refining programs.

ARTICLE V — DIRECTOR AND STAFF

*Section 1- Executive Director*

The executive director is hired by the board. The executive director has day-to-day responsibilities for the organization, including carrying out the organization's goals and policies. The executive director will attend all board meetings, report on the progress of the organization, answer questions of the board members and carry out the duties described in the job description. The board can designate other duties as necessary.

#### ARTICLE VI — AMENDMENTS

##### *Section 1- Amendments*

These bylaws may be amended when necessary by two-thirds majority of the board of directors. Proposed amendments must be submitted to the secretary to be sent out with regular board announcements.

#### CERTIFICATION

These bylaws were approved at the first meeting of the board of directors by a two- thirds majority vote on November 18, 2018.

Linda Wilde  
11/18/18

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Secretary

Date



A new interactive version of Form 1023 is available at [StayExempt.irs.gov](http://www.StayExempt.irs.gov). It includes prerequisite questions, auto-calculated fields, help buttons and links to relevant information.

Form **1023**  
(Rev. December 2013)  
Department of the Treasury  
Internal Revenue Service

**Application for Recognition of Exemption**  
**Under Section 501(c)(3) of the Internal Revenue Code**

(00) OMB No. 1545-0056

**Note:** If exempt status is approved, this application will be open for public inspection.

▶ (Use with the June 2006 revision of the Instructions for Form 1023 and the current Notice 1382)

Use the instructions to complete this application and for a definition of all **bold** items. For additional help, call IRS Exempt Organizations Customer Account Services toll-free at 1-877-829-5500. Visit our website at [www.irs.gov](http://www.irs.gov) for forms and publications. If the required information and documents are not submitted with payment of the appropriate user fee, the application may be returned to you.

Attach additional sheets to this application if you need more space to answer fully. Put your name and EIN on each sheet and identify each answer by Part and line number. Complete Parts I - XI of Form 1023 and submit only those Schedules (A through H) that apply to you.

**Part I Identification of Applicant**

<b>1</b> Full name of organization (exactly as it appears in your <b>organizing document</b> )		<b>2</b> c/o Name (if applicable)	
Bridge the GAP, Inc.			
<b>3</b> Mailing address (Number and street) (see instructions)	Room/Suite	<b>4</b> Employer Identification Number (EIN)	
3500 SW 19th Ave		12-3456789	
City or town, state or country, and ZIP + 4		<b>5</b> Month the annual accounting period ends (01 - 12)	
Gainesville, Florida, USA, 32607		12	
<b>6</b> Primary contact (officer, director, trustee, or <b>authorized representative</b> )		<b>b</b> Phone: 813-263-5476	
<b>a</b> Name: Kelsey Gemmill		<b>c</b> Fax: (optional)	
<b>7</b> Are you represented by an authorized representative, such as an attorney or accountant? If "Yes," provide the authorized representative's name, and the name and address of the authorized representative's firm. Include a completed Form 2848, <i>Power of Attorney and Declaration of Representative</i> , with your application if you would like us to communicate with your representative.		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>8</b> Was a person who is not one of your officers, directors, trustees, employees, or an authorized representative listed in line 7, paid, or promised payment, to help plan, manage, or advise you about the structure or activities of your organization, or about your financial or tax matters? If "Yes," provide the person's name, the name and address of the person's firm, the amounts paid or promised to be paid, and describe that person's role.		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>9a</b> Organization's website: <a href="http://www.BridgetheGAPAlachua.org">www.BridgetheGAPAlachua.org</a>			
<b>b</b> Organization's email: (optional) <a href="mailto:bridgetheGAP@gmail.com">bridgetheGAP@gmail.com</a>			
<b>10</b> Certain organizations are not required to file an information return (Form 990 or Form 990-EZ). If you are granted tax-exemption, are you claiming to be excused from filing Form 990 or Form 990-EZ? If "Yes," explain. See the instructions for a description of organizations not required to file Form 990 or Form 990-EZ.		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>11</b> Date incorporated if a corporation, or formed, if other than a corporation. (MM/DD/YYYY)		12 / 3 / 2018	
<b>12</b> Were you formed under the laws of a <b>foreign country</b> ? If "Yes," state the country.		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

For Paperwork Reduction Act Notice, see page 24 of the instructions.

Cat. No. 17133K

Form **1023** (Rev. 12-2013)

**Part II Organizational Structure**

You must be a corporation (including a limited liability company), an unincorporated association, or a trust to be tax exempt. (See instructions.) **DO NOT file this form unless you can check "Yes" on lines 1, 2, 3, or 4.**

- 1** Are you a **corporation**? If "Yes," attach a copy of your articles of incorporation showing **certification of filing** with the appropriate state agency. Include copies of any amendments to your articles and be sure they also show state filing certification.  **Yes**  **No**
- 2** Are you a **limited liability company (LLC)**? If "Yes," attach a copy of your articles of organization showing certification of filing with the appropriate state agency. Also, if you adopted an operating agreement, attach a copy. Include copies of any amendments to your articles and be sure they show state filing certification. Refer to the instructions for circumstances when an LLC should not file its own exemption application.  **Yes**  **No**
- 3** Are you an **unincorporated association**? If "Yes," attach a copy of your articles of association, constitution, or other similar organizing document that is dated and includes at least two signatures. Include signed and dated copies of any amendments.  **Yes**  **No**
- 4a** Are you a **trust**? If "Yes," attach a signed and dated copy of your trust agreement. Include signed and dated copies of any amendments.  **Yes**  **No**
- b** Have you been funded? If "No," explain how you are formed without anything of value placed in trust.  **Yes**  **No**
- 5** Have you adopted **bylaws**? If "Yes," attach a current copy showing date of adoption. If "No," explain how your officers, directors, or trustees are selected.  **Yes**  **No**

**Part III Required Provisions in Your Organizing Document**

The following questions are designed to ensure that when you file this application, your organizing document contains the required provisions to meet the organizational test under section 501(c)(3). Unless you can check the boxes in both lines 1 and 2, your organizing document does not meet the organizational test. **DO NOT file this application until you have amended your organizing document.** Submit your original and amended organizing documents (showing state filing certification if you are a corporation or an LLC) with your application.

- 1** Section 501(c)(3) requires that your organizing document state your exempt purpose(s), such as charitable, religious, educational, and/or scientific purposes. Check the box to confirm that your organizing document meets this requirement. Describe specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document. Refer to the instructions for exempt purpose language. Location of Purpose Clause (Page, Article, and Paragraph):
- 2a** Section 501(c)(3) requires that upon dissolution of your organization, your remaining assets must be used exclusively for exempt purposes, such as charitable, religious, educational, and/or scientific purposes. Check the box on line 2a to confirm that your organizing document meets this requirement by express provision for the distribution of assets upon dissolution. If you rely on state law for your dissolution provision, do not check the box on line 2a and go to line 2c.
- 2b** If you checked the box on line 2a, specify the location of your dissolution clause (Page, Article, and Paragraph). Do not complete line 2c if you checked box 2a. \_\_\_\_\_
- 2c** See the instructions for information about the operation of state law in your particular state. Check this box if you rely on operation of state law for your dissolution provision and indicate the state:

**Part IV Narrative Description of Your Activities**

Using an attachment, describe your *past*, *present*, and *planned* activities in a narrative. If you believe that you have already provided some of this information in response to other parts of this application, you may summarize that information here and refer to the specific parts of the application for supporting details. You may also attach representative copies of newsletters, brochures, or similar documents for supporting details to this narrative. Remember that if this application is approved, it will be open for public inspection. Therefore, your narrative description of activities should be thorough and accurate. Refer to the instructions for information that must be included in your description.

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors**

- 1a** List the names, titles, and mailing addresses of all of your officers, directors, and trustees. For each person listed, state their total annual **compensation**, or proposed compensation, for all services to the organization, whether as an officer, employee, or other position. Use actual figures, if available. Enter "none" if no compensation is or will be paid. If additional space is needed, attach a separate sheet. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
Isabella Herb	Chair	583 Elm Ave Tampa, FL	none
Owen Wilde	Secretary	9090 West Drive Gainesville, FL	none
Robert Gemmill	Treasurer	123 A Street, N. Gainesville, FL	none
Michael Shoemaker	Director	1234 Garden Street Tampa, FL	none
Allison Kim	Director	27 SW 8th Drive Gainesville, FL	none

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)**

**b** List the names, titles, and mailing addresses of each of your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation. Do not include officers, directors, or trustees listed in line 1a.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
<b>Madison Elias</b>	<b>Executive Director</b>	<b>83901 Center Drive Gainesville, FL</b>	<b>\$40,000/year</b>
<b>Abigail Elks</b>	<b>Education Director</b>	<b>92 West Lavender Drive Alachua, FL</b>	<b>\$32,000/year</b>
<b>Preston Oshem</b>	<b>Outreach Director</b>	<b>472 Concord Ave Micanopy, FL</b>	<b>\$32,000/year</b>
<b>Michelle Riche</b>	<b>Human Resources/Finance Dir.</b>	<b>9002 Wildewood Road Gainesville, FL</b>	<b>\$32,000/year</b>

**c** List the names, names of businesses, and mailing addresses of your five highest compensated independent contractors that receive or will receive compensation of more than \$50,000 per year. Use the actual figure, if available. Refer to the instructions for information on what to include as compensation.

Name	Title	Mailing address	Compensation amount (annual actual or estimated)
<b>None</b>			

The following "Yes" or "No" questions relate to *past, present, or planned* relationships, transactions, or agreements with your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, and 1c.

- 2a** Are any of your officers, directors, or trustees **related** to each other through **family or business relationships**? If "Yes," identify the individuals and explain the relationship.  Yes  No
  - b** Do you have a business relationship with any of your officers, directors, or trustees other than through their position as an officer, director, or trustee? If "Yes," identify the individuals and describe the business relationship with each of your officers, directors, or trustees.  Yes  No
  - c** Are any of your officers, directors, or trustees related to your highest compensated employees or highest compensated independent contractors listed on lines 1b or 1c through family or business relationships? If "Yes," identify the individuals and explain the relationship.  Yes  No
- 
- 3a** For each of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c, attach a list showing their name, qualifications, average hours worked, and duties.
  - b** Do any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, or 1c receive compensation from any other organizations, whether tax exempt or taxable, that are related to you through **common control**? If "Yes," identify the individuals, explain the relationship between you and the other organization, and describe the compensation arrangement.  Yes  No
- 
- 4** In establishing the compensation for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed on lines 1a, 1b, and 1c, the following practices are recommended, although they are not required to obtain exemption. Answer "Yes" to all the practices you use.
    - a** Do you or will the individuals that approve compensation arrangements follow a conflict of interest policy?  Yes  No
    - b** Do you or will you approve compensation arrangements in advance of paying compensation?  Yes  No
    - c** Do you or will you document in writing the date and terms of approved compensation arrangements?  Yes  No

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)**

<b>d</b>	Do you or will you record in writing the decision made by each individual who decided or voted on compensation arrangements?	<input checked="" type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>
<b>e</b>	Do you or will you approve compensation arrangements based on information about compensation paid by <b>similarly situated</b> taxable or tax-exempt organizations for similar services, current compensation surveys compiled by independent firms, or actual written offers from similarly situated organizations? Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.	<input checked="" type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>
<b>f</b>	Do you or will you record in writing both the information on which you relied to base your decision and its source?	<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>
<b>g</b>	If you answered "No" to any item on lines 4a through 4f, describe how you set compensation that is <b>reasonable</b> for your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c.	
<b>5a</b>	Have you adopted a <b>conflict of interest policy</b> consistent with the sample conflict of interest policy in Appendix A to the instructions? If "Yes," provide a copy of the policy and explain how the policy has been adopted, such as by resolution of your governing board. If "No," answer lines 5b and 5c.	<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>
<b>b</b>	What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you for setting their own compensation?	
<b>c</b>	What procedures will you follow to assure that persons who have a conflict of interest will not have influence over you regarding business deals with themselves?	
	<b>Note:</b> A conflict of interest policy is recommended though it is not required to obtain exemption. Hospitals, see Schedule C, Section I, line 14.	
<b>6a</b>	Do you or will you compensate any of your officers, directors, trustees, highest compensated employees, and highest compensated independent contractors listed in lines 1a, 1b, or 1c through <b>non-fixed payments</b> , such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are determined, who is eligible for such arrangements, whether you place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.	<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>
<b>b</b>	Do you or will you compensate any of your employees, other than your officers, directors, trustees, or your five highest compensated employees who receive or will receive compensation of more than \$50,000 per year, through non-fixed payments, such as discretionary bonuses or revenue-based payments? If "Yes," describe all non-fixed compensation arrangements, including how the amounts are or will be determined, who is or will be eligible for such arrangements, whether you place or will place a limitation on total compensation, and how you determine or will determine that you pay no more than reasonable compensation for services. Refer to the instructions for Part V, lines 1a, 1b, and 1c, for information on what to include as compensation.	<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>
<b>7a</b>	Do you or will you purchase any goods, services, or assets from any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such purchase that you made or intend to make, from whom you make or will make such purchases, how the terms are or will be negotiated at <b>arm's length</b> , and explain how you determine or will determine that you pay no more than <b>fair market value</b> . Attach copies of any written contracts or other agreements relating to such purchases.	<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>
<b>b</b>	Do you or will you sell any goods, services, or assets to any of your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," describe any such sales that you made or intend to make, to whom you make or will make such sales, how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you are or will be paid at least fair market value. Attach copies of any written contracts or other agreements relating to such sales.	<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>
<b>8a</b>	Do you or will you have any leases, contracts, loans, or other agreements with your officers, directors, trustees, highest compensated employees, or highest compensated independent contractors listed in lines 1a, 1b, or 1c? If "Yes," provide the information requested in lines 8b through 8f.	<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>
<b>b</b>	Describe any written or oral arrangements that you made or intend to make.	
<b>c</b>	Identify with whom you have or will have such arrangements.	
<b>d</b>	Explain how the terms are or will be negotiated at arm's length.	
<b>e</b>	Explain how you determine you pay no more than fair market value or you are paid at least fair market value.	
<b>f</b>	Attach copies of any signed leases, contracts, loans, or other agreements relating to such arrangements.	
<b>9a</b>	Do you or will you have any leases, contracts, loans, or other agreements with any organization in which any of your officers, directors, or trustees are also officers, directors, or trustees, or in which any individual officer, director, or trustee owns more than a 35% interest? If "Yes," provide the information requested in lines 9b through 9f.	<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>

**Part V Compensation and Other Financial Arrangements With Your Officers, Directors, Trustees, Employees, and Independent Contractors (Continued)**

- b Describe any written or oral arrangements you made or intend to make.
- c Identify with whom you have or will have such arrangements.
- d Explain how the terms are or will be negotiated at arm's length.
- e Explain how you determine or will determine you pay no more than fair market value or that you are paid at least fair market value.
- f Attach a copy of any signed leases, contracts, loans, or other agreements relating to such arrangements.

**Part VI Your Members and Other Individuals and Organizations That Receive Benefits From You**

The following "Yes" or "No" questions relate to goods, services, and funds you provide to individuals and organizations as part of your activities. Your answers should pertain to *past*, *present*, and *planned* activities. (See instructions.)

- 1a In carrying out your exempt purposes, do you provide goods, services, or funds to individuals? If "Yes," describe each program that provides goods, services, or funds to individuals.  Yes  No
- b In carrying out your exempt purposes, do you provide goods, services, or funds to organizations? If "Yes," describe each program that provides goods, services, or funds to organizations.  Yes  No
- 2 Do any of your programs limit the provision of goods, services, or funds to a specific individual or group of specific individuals? For example, answer "Yes," if goods, services, or funds are provided only for a particular individual, your members, individuals who work for a particular employer, or graduates of a particular school. If "Yes," explain the limitation and how recipients are selected for each program.  Yes  No
- 3 Do any individuals who receive goods, services, or funds through your programs have a family or business relationship with any officer, director, trustee, or with any of your highest compensated employees or highest compensated independent contractors listed in Part V, lines 1a, 1b, and 1c? If "Yes," explain how these related individuals are eligible for goods, services, or funds.  Yes  No

**Part VII Your History**

The following "Yes" or "No" questions relate to your history. (See instructions.)

- 1 Are you a **successor** to another organization? Answer "Yes," if you have taken or will take over the activities of another organization; you took over 25% or more of the fair market value of the net assets of another organization; or you were established upon the conversion of an organization from for-profit to non-profit status. If "Yes," complete Schedule G.  Yes  No
- 2 Are you submitting this application more than 27 months after the end of the month in which you were legally formed? If "Yes," complete Schedule E.  Yes  No

**Part VIII Your Specific Activities**

The following "Yes" or "No" questions relate to specific activities that you may conduct. Check the appropriate box. Your answers should pertain to *past*, *present*, and *planned* activities. (See instructions.)

- 1 Do you support or oppose candidates in **political campaigns** in any way? If "Yes," explain.  Yes  No
- 2a Do you attempt to **influence legislation**? If "Yes," explain how you attempt to influence legislation and complete line 2b. If "No," go to line 3a.  Yes  No
- b Have you made or are you making an **election** to have your legislative activities measured by expenditures by filing Form 5768? If "Yes," attach a copy of the Form 5768 that was already filed or attach a completed Form 5768 that you are filing with this application. If "No," describe whether your attempts to influence legislation are a substantial part of your activities. Include the time and money spent on your attempts to influence legislation as compared to your total activities.  Yes  No
- 3a Do you or will you operate bingo or **gaming** activities? If "Yes," describe who conducts them, and list all revenue received or expected to be received and expenses paid or expected to be paid in operating these activities. **Revenue and expenses** should be provided for the time periods specified in Part IX, Financial Data.  Yes  No
- b Do you or will you enter into contracts or other agreements with individuals or organizations to conduct bingo or gaming for you? If "Yes," describe any written or oral arrangements that you made or intend to make, identify with whom you have or will have such arrangements, explain how the terms are or will be negotiated at arm's length, and explain how you determine or will determine you pay no more than fair market value or you will be paid at least fair market value. Attach copies or any written contracts or other agreements relating to such arrangements.  Yes  No
- c List the states and local jurisdictions, including Indian Reservations, in which you conduct or will conduct gaming or bingo.

**Part VIII Your Specific Activities (Continued)**

**4a** Do you or will you undertake **fundraising**? If "Yes," check all the fundraising programs you do or will conduct. (See instructions.)  **Yes**  **No**

<input checked="" type="checkbox"/> mail solicitations	<input type="checkbox"/> phone solicitations
<input checked="" type="checkbox"/> email solicitations	<input checked="" type="checkbox"/> accept donations on your website
<input checked="" type="checkbox"/> personal solicitations	<input checked="" type="checkbox"/> receive donations from another organization's website
<input type="checkbox"/> vehicle, boat, plane, or similar donations	<input checked="" type="checkbox"/> government grant solicitations
<input type="checkbox"/> foundation grant solicitations	<input checked="" type="checkbox"/> Other

Attach a description of each fundraising program.

**b** Do you or will you have written or oral contracts with any individuals or organizations to raise funds for you? If "Yes," describe these activities. Include all revenue and expenses from these activities and state who conducts them. Revenue and expenses should be provided for the time periods specified in Part IX, Financial Data. Also, attach a copy of any contracts or agreements.  **Yes**  **No**

**c** Do you or will you engage in fundraising activities for other organizations? If "Yes," describe these arrangements. Include a description of the organizations for which you raise funds and attach copies of all contracts or agreements.  **Yes**  **No**

**d** List all states and local jurisdictions in which you conduct fundraising. For each state or local jurisdiction listed, specify whether you fundraise for your own organization, you fundraise for another organization, or another organization fundraises for you.

**e** Do you or will you maintain separate accounts for any contributor under which the contributor has the right to advise on the use or distribution of funds? Answer "Yes" if the donor may provide advice on the types of investments, distributions from the types of investments, or the distribution from the donor's contribution account. If "Yes," describe this program, including the type of advice that may be provided and submit copies of any written materials provided to donors.  **Yes**  **No**

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**5** Are you **affiliated** with a governmental unit? If "Yes," explain.  **Yes**  **No**

**6a** Do you or will you engage in **economic development**? If "Yes," describe your program.  **Yes**  **No**

**b** Describe in full who benefits from your economic development activities and how the activities promote exempt purposes.

**7a** Do or will persons other than your employees or volunteers **develop** your facilities? If "Yes," describe each facility, the role of the developer, and any business or family relationship(s) between the developer and your officers, directors, or trustees.  **Yes**  **No**

**b** Do or will persons other than your employees or volunteers **manage** your activities or facilities? If "Yes," describe each activity and facility, the role of the manager, and any business or family relationship(s) between the manager and your officers, directors, or trustees.  **Yes**  **No**

**c** If there is a business or family relationship between any manager or developer and your officers, directors, or trustees, identify the individuals, explain the relationship, describe how contracts are negotiated at arm's length so that you pay no more than fair market value, and submit a copy of any contracts or other agreements.

**8** Do you or will you enter into **joint ventures**, including partnerships or **limited liability companies** treated as partnerships, in which you share profits and losses with partners other than section 501(c)(3) organizations? If "Yes," describe the activities of these joint ventures in which you participate.  **Yes**  **No**

**9a** Are you applying for exemption as a childcare organization under section 501(k)? If "Yes," answer lines 9b through 9d. If "No," go to line 10.  **Yes**  **No**

**b** Do you provide child care so that parents or caretakers of children you care for can be **gainfully employed** (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**c** Of the children for whom you provide child care, are 85% or more of them cared for by you to enable their parents or caretakers to be gainfully employed (see instructions)? If "No," explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**d** Are your services available to the general public? If "No," describe the specific group of people for whom your activities are available. Also, see the instructions and explain how you qualify as a childcare organization described in section 501(k).  **Yes**  **No**

**10** Do you or will you publish, own, or have rights in music, literature, tapes, artworks, choreography, scientific discoveries, or other **intellectual property**? If "Yes," explain. Describe who owns or will own any copyrights, patents, or trademarks, whether fees are or will be charged, how the fees are determined, and how any items are or will be produced, distributed, and marketed.  **Yes**  **No**

**Part VIII Your Specific Activities (Continued)**

- 11** Do you or will you accept contributions of: real property; conservation easements; closely held securities; intellectual property such as patents, trademarks, and copyrights; works of music or art; licenses; royalties; automobiles, boats, planes, or other vehicles; or collectibles of any type? If "Yes," describe each type of contribution, any conditions imposed by the donor on the contribution, and any agreements with the donor regarding the contribution.  **Yes**  **No**
- 
- 12a** Do you or will you operate in a **foreign country or countries?** If "Yes," answer lines 12b through 12d. If "No," go to line 13a.  **Yes**  **No**
- b** Name the foreign countries and regions within the countries in which you operate.
- c** Describe your operations in each country and region in which you operate.
- d** Describe how your operations in each country and region further your exempt purposes.
- 
- 13a** Do you or will you make grants, loans, or other distributions to organization(s)? If "Yes," answer lines 13b through 13g. If "No," go to line 14a.  **Yes**  **No**
- b** Describe how your grants, loans, or other distributions to organizations further your exempt purposes.
- c** Do you have written contracts with each of these organizations? If "Yes," attach a copy of each contract.  **Yes**  **No**
- d** Identify each recipient organization and any **relationship** between you and the recipient organization.
- e** Describe the records you keep with respect to the grants, loans, or other distributions you make.
- f** Describe your selection process, including whether you do any of the following:
- (i)** Do you require an application form? If "Yes," attach a copy of the form.  **Yes**  **No**
- (ii)** Do you require a grant proposal? If "Yes," describe whether the grant proposal specifies your responsibilities and those of the grantee, obligates the grantee to use the grant funds only for the purposes for which the grant was made, provides for periodic written reports concerning the use of grant funds, requires a final written report and an accounting of how grant funds were used, and acknowledges your authority to withhold and/or recover grant funds in case such funds are, or appear to be, misused.  **Yes**  **No**
- g** Describe your procedures for oversight of distributions that assure you the resources are used to further your exempt purposes, including whether you require periodic and final reports on the use of resources.
- 
- 14a** Do you or will you make grants, loans, or other distributions to foreign organizations? If "Yes," answer lines 14b through 14f. If "No," go to line 15.  **Yes**  **No**
- b** Provide the name of each foreign organization, the country and regions within a country in which each foreign organization operates, and describe any relationship you have with each foreign organization.
- c** Does any foreign organization listed in line 14b accept contributions earmarked for a specific country or specific organization? If "Yes," list all earmarked organizations or countries.  **Yes**  **No**
- d** Do your contributors know that you have ultimate authority to use contributions made to you at your discretion for purposes consistent with your exempt purposes? If "Yes," describe how you relay this information to contributors.  **Yes**  **No**
- e** Do you or will you make pre-grant inquiries about the recipient organization? If "Yes," describe these inquiries, including whether you inquire about the recipient's financial status, its tax-exempt status under the Internal Revenue Code, its ability to accomplish the purpose for which the resources are provided, and other relevant information.  **Yes**  **No**
- f** Do you or will you use any additional procedures to ensure that your distributions to foreign organizations are used in furtherance of your exempt purposes? If "Yes," describe these procedures, including site visits by your employees or compliance checks by impartial experts, to verify that grant funds are being used appropriately.  **Yes**  **No**

**Part VIII Your Specific Activities** *(Continued)*

- |           |  |                                     |   |
|-----------|--|-------------------------------------|---|
| <b>15</b> | Do you have a <b>close connection</b> with any organizations? If "Yes," explain.   | <input type="checkbox"/> <b>Yes</b> | <input checked="" type="checkbox"/> <b>No</b> |
| <b>16</b> | Are you applying for exemption as a <b>cooperative hospital service organization</b> under section 501(e)? If "Yes," explain.  | <input type="checkbox"/> <b>Yes</b> | <input checked="" type="checkbox"/> <b>No</b> |
| <b>17</b> | Are you applying for exemption as a <b>cooperative service organization of operating educational organizations</b> under section 501(f)? If "Yes," explain.  | <input type="checkbox"/> <b>Yes</b> | <input checked="" type="checkbox"/> <b>No</b> |
| <b>18</b> | Are you applying for exemption as a <b>charitable risk pool</b> under section 501(n)? If "Yes," explain.   | <input type="checkbox"/> <b>Yes</b> | <input checked="" type="checkbox"/> <b>No</b> |
| <b>19</b> | Do you or will you operate a <b>school</b> ? If "Yes," complete Schedule B. Answer "Yes," whether you operate a school as your main function or as a secondary activity.   | <input type="checkbox"/> <b>Yes</b> | <input checked="" type="checkbox"/> <b>No</b> |
| <b>20</b> | Is your main function to provide <b>hospital or medical care</b> ? If "Yes," complete Schedule C.  | <input type="checkbox"/> <b>Yes</b> | <input checked="" type="checkbox"/> <b>No</b> |
| <b>21</b> | Do you or will you provide <b>low-income housing</b> or housing for the <b>elderly or handicapped</b> ? If "Yes," complete Schedule F.   | <input type="checkbox"/> <b>Yes</b> | <input checked="" type="checkbox"/> <b>No</b> |
| <b>22</b> | Do you or will you provide scholarships, fellowships, educational loans, or other educational grants to individuals, including grants for travel, study, or other similar purposes? If "Yes," complete Schedule H. | <input type="checkbox"/> <b>Yes</b> | <input checked="" type="checkbox"/> <b>No</b> |

**Note:** **Private foundations** may use Schedule H to request advance approval of individual grant procedures.



**Part IX Financial Data**

For purposes of this schedule, years in existence refer to completed tax years. If in existence 4 or more years, complete the schedule for the most recent 4 tax years. If in existence more than 1 year but less than 4 years, complete the statements for each year in existence and provide projections of your likely revenues and expenses based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. If in existence less than 1 year, provide projections of your likely revenues and expenses for the current year and the 2 following years, based on a reasonable and good faith estimate of your future finances for a total of 3 years of financial information. (See instructions.)

**A. Statement of Revenues and Expenses**

Type of revenue or expense	Current tax year	3 prior tax years or 2 succeeding tax years			(e) Provide Total for (a) through (d)
	(a) From <u>1/1/2018</u> To <u>12/31/18</u>	(b) From <u>1/1/2019</u> To <u>12/31/19</u>	(c) From <u>1/1/20</u> To <u>12/31/20</u>	(d) From ..... To .....	
<b>1</b> Gifts, grants, and contributions received (do not include unusual grants)	250,000	400,000	470,000		1,120,000
<b>2</b> Membership fees received					
<b>3</b> Gross investment income	12,000	12,000	12,000		36,000
<b>4</b> Net unrelated business income					
<b>5</b> Taxes levied for your benefit					
<b>6</b> Value of services or facilities furnished by a governmental unit without charge (not including the value of services generally furnished to the public without charge)					
<b>7</b> Any revenue not otherwise listed above or in lines 9-12 below (attach an itemized list)	3,000	3,000	3,000		9,000
<b>8</b> Total of lines 1 through 7	265,000	415,000	485,000		1,165,000
<b>9</b> Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to your exempt purposes (attach itemized list)		20,000	20,000		
<b>10</b> Total of lines 8 and 9	265,000	435,000	505,000		
<b>11</b> Net gain or loss on sale of capital assets (attach schedule and see instructions)					
<b>12</b> Unusual grants	40,000				
<b>13</b> Total Revenue Add lines 10 through 12	305,000	435,000	505,000		1,245,000
<b>14</b> Fundraising expenses	25,000	25,000	25,000		
<b>15</b> Contributions, gifts, grants, and similar amounts paid out (attach an itemized list)					
<b>16</b> Disbursements to or for the benefit of members (attach an itemized list)					
<b>17</b> Compensation of officers, directors, and trustees					
<b>18</b> Other salaries and wages	136,000	146,000	156,000		
<b>19</b> Interest expense					
<b>20</b> Occupancy (rent, utilities, etc.)	30,000	30,000	30,000		
<b>21</b> Depreciation and depletion					
<b>22</b> Professional fees					
<b>23</b> Any expense not otherwise classified, such as program services (attach itemized list)					
<b>24</b> Total Expenses Add lines 14 through 23	191,000	201,000	210,000		

**Part IX Financial Data (Continued)**

<b>B. Balance Sheet (for your most recently completed tax year)</b>		Year End: <b>2018</b>
		(Whole dollars)
<b>Assets</b>		
<b>1</b>	Cash . . . . .	<b>31,000</b>
<b>2</b>	Accounts receivable, net . . . . .	<b>9,200</b>
<b>3</b>	Inventories . . . . .	<b>11,000</b>
<b>4</b>	Bonds and notes receivable (attach an itemized list) . . . . .	<b>0</b>
<b>5</b>	Corporate stocks (attach an itemized list) . . . . .	<b>0</b>
<b>6</b>	Loans receivable (attach an itemized list) . . . . .	<b>0</b>
<b>7</b>	Other investments (attach an itemized list) . . . . .	<b>2,000</b>
<b>8</b>	Depreciable and depletable assets (attach an itemized list) . . . . .	<b>30,000</b>
<b>9</b>	Land . . . . .	<b>0</b>
<b>10</b>	Other assets (attach an itemized list) . . . . .	<b>25,000</b>
<b>11</b>	<b>Total Assets (add lines 1 through 10)</b> . . . . .	<b>108,200</b>
<b>Liabilities</b>		
<b>12</b>	Accounts payable . . . . .	<b>62,000</b>
<b>13</b>	Contributions, gifts, grants, etc. payable . . . . .	<b>0</b>
<b>14</b>	Mortgages and notes payable (attach an itemized list) . . . . .	<b>0</b>
<b>15</b>	Other liabilities (attach an itemized list) . . . . .	<b>2,000</b>
<b>16</b>	<b>Total Liabilities (add lines 12 through 15)</b> . . . . .	<b>64,000</b>
<b>Fund Balances or Net Assets</b>		
<b>17</b>	<b>Total fund balances or net assets</b> . . . . .	<b>44,200</b>
<b>18</b>	<b>Total Liabilities and Fund Balances or Net Assets (add lines 16 and 17)</b> . . . . .	<b>108,200</b>
<b>19</b>	Have there been any substantial changes in your assets or liabilities since the end of the period shown above? If "Yes," explain.	<input type="checkbox"/> <b>Yes</b> <input checked="" type="checkbox"/> <b>No</b>

**Part X Public Charity Status**

Part X is designed to classify you as an organization that is either a **private foundation** or a **public charity**. Public charity status is a more favorable tax status than private foundation status. If you are a private foundation, Part X is designed to further determine whether you are a **private operating foundation**. (See instructions.)

- 1a** Are you a private foundation? If "Yes," go to line 1b. If "No," go to line 5 and proceed as instructed. If you are unsure, see the instructions.  **Yes**  **No**
- b** As a private foundation, section 508(e) requires special provisions in your organizing document in addition to those that apply to all organizations described in section 501(c)(3). Check the box to confirm that your organizing document meets this requirement, whether by express provision or by reliance on operation of state law. Attach a statement that describes specifically where your organizing document meets this requirement, such as a reference to a particular article or section in your organizing document or by operation of state law. See the instructions, including Appendix B, for information about the special provisions that need to be contained in your organizing document. Go to line 2.
- 2** Are you a private operating foundation? To be a private operating foundation you must engage directly in the active conduct of charitable, religious, educational, and similar activities, as opposed to indirectly carrying out these activities by providing grants to individuals or other organizations. If "Yes," go to line 3. If "No," go to the signature section of Part XI.  **Yes**  **No**
- 3** Have you existed for one or more years? If "Yes," attach financial information showing that you are a private operating foundation; go to the signature section of Part XI. If "No," continue to line 4.  **Yes**  **No**
- 4** Have you attached either (1) an affidavit or opinion of counsel, (including a written affidavit or opinion from a certified public accountant or accounting firm with expertise regarding this tax law matter), that sets forth facts concerning your operations and support to demonstrate that you are likely to satisfy the requirements to be classified as a private operating foundation; or (2) a statement describing your proposed operations as a private operating foundation?  **Yes**  **No**
- 5** If you answered "No" to line 1a, indicate the type of public charity status you are requesting by checking one of the choices below. You may check only one box.
- The organization is not a private foundation because it is:
- a** 509(a)(1) and 170(b)(1)(A)(i)—a church or a convention or association of churches. Complete and attach Schedule A.
- b** 509(a)(1) and 170(b)(1)(A)(ii)—a **school**. Complete and attach Schedule B.
- c** 509(a)(1) and 170(b)(1)(A)(iii)—a **hospital**, a cooperative hospital service organization, or a medical research organization operated in conjunction with a hospital. Complete and attach Schedule C.
- d** 509(a)(3)—an organization supporting either one or more organizations described in line 5a through c, f, g, or h or a publicly supported section 501(c)(4), (5), or (6) organization. Complete and attach Schedule D.

**Part X Public Charity Status (Continued)**

- e 509(a)(4)—an organization organized and operated exclusively for testing for public safety.
- f 509(a)(1) and 170(b)(1)(A)(iv)—an organization operated for the benefit of a college or university that is owned or operated by a governmental unit.
- g 509(a)(1) and 170(b)(1)(A)(vi)—an organization that receives a substantial part of its financial support in the form of contributions from publicly supported organizations, from a governmental unit, or from the general public.
- h 509(a)(2)—an organization that normally receives not more than one-third of its financial support from gross investment income and receives more than one-third of its financial support from contributions, membership fees, and gross receipts from activities related to its exempt functions (subject to certain exceptions).
- i A publicly supported organization, but unsure if it is described in 5g or 5h. The organization would like the IRS to decide the correct status.

**6** If you checked box g, h, or i in question 5 above, you must request either an **advance** or a **definitive ruling** by selecting one of the boxes below. Refer to the instructions to determine which type of ruling you are eligible to receive.

**a Request for Advance Ruling:** By checking this box and signing the consent, pursuant to section 6501(c)(4) of the Code you request an advance ruling and agree to extend the statute of limitations on the assessment of excise tax under section 4940 of the Code. The tax will apply only if you do not establish public support status at the end of the 5-year advance ruling period. The assessment period will be extended for the 5 advance ruling years to 8 years, 4 months, and 15 days beyond the end of the first year. You have the right to refuse or limit the extension to a mutually agreed-upon period of time or issue(s). Publication 1035, *Extending the Tax Assessment Period*, provides a more detailed explanation of your rights and the consequences of the choices you make. You may obtain Publication 1035 free of charge from the IRS web site at [www.irs.gov](http://www.irs.gov) or by calling toll-free 1-800-829-3676. Signing this consent will not deprive you of any appeal rights to which you would otherwise be entitled. If you decide not to extend the statute of limitations, you are not eligible for an advance ruling.

**Consent Fixing Period of Limitations Upon Assessment of Tax Under Section 4940 of the Internal Revenue Code**

For Organization

.....  
 (Signature of Officer, Director, Trustee, or other authorized official)

.....  
 (Type or print name of signer)

.....  
 (Date)

.....  
 (Type or print title or authority of signer)

For IRS Use Only

.....  
 IRS Director, Exempt Organizations

.....  
 (Date)

**b Request for Definitive Ruling:** Check this box if you have completed one tax year of at least 8 full months and you are requesting a definitive ruling. To confirm your public support status, answer line 6b(i) if you checked box g in line 5 above. Answer line 6b(ii) if you checked box h in line 5 above. If you checked box i in line 5 above, answer both lines 6b(i) and (ii).

(i) (a) Enter 2% of line 8, column (e) on Part IX-A. Statement of Revenues and Expenses. 53,000

(b) Attach a list showing the name and amount contributed by each person, company, or organization whose gifts totaled more than the 2% amount. If the answer is "None," check this box.

(ii) (a) For each year amounts are included on lines 1, 2, and 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each **disqualified person**. If the answer is "None," check this box.

(b) For each year amounts are included on line 9 of Part IX-A. Statement of Revenues and Expenses, attach a list showing the name of and amount received from each payer, other than a disqualified person, whose payments were more than the larger of (1) 1% of line 10, Part IX-A. Statement of Revenues and Expenses, or (2) \$5,000. If the answer is "None," check this box.

**7** Did you receive any unusual grants during any of the years shown on Part IX-A. Statement of Revenues and Expenses? If "Yes," attach a list including the name of the contributor, the date and amount of the grant, a brief description of the grant, and explain why it is unusual.  Yes  No

**Part XI User Fee Information**

You must include a user fee payment with this application. It will not be processed without your paid user fee. If your average annual gross receipts have exceeded or will exceed \$10,000 annually over a 4-year period, you must submit payment of \$850. If your gross receipts have not exceeded or will not exceed \$10,000 annually over a 4-year period, the required user fee payment is \$400. See instructions for Part XI, for a definition of **gross receipts** over a 4-year period. Your check or money order must be made payable to the United States Treasury. *User fees are subject to change. Check our website at [www.irs.gov](http://www.irs.gov) and type "User Fee" in the keyword box, or call Customer Account Services at 1-877-829-5500 for current information.*

- 1 Have your annual gross receipts averaged or are they expected to average not more than \$10,000?  Yes  No  
 If "Yes," check the box on line 2 and enclose a user fee payment of \$400 (Subject to change—see above).  
 If "No," check the box on line 3 and enclose a user fee payment of \$850 (Subject to change—see above).
- 2 Check the box if you have enclosed the reduced user fee payment of \$400 (Subject to change).
- 3 Check the box if you have enclosed the user fee payment of \$850 (Subject to change).

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

**Please  
Sign  
Here**



.....  
 (Signature of Officer, Director, Trustee, or other authorized official)

**Kelsey Gemmill**

.....  
 (Type or print name of signer)

**12/31/2018**

.....  
 (Date)

**Executive Director**

.....  
 (Type or print title or authority of signer)

**Reminder:** Send the completed Form 1023 Checklist with your filled-in-application.

## **Section 5: Program Plan and Evaluation**

### **Program Plan**

#### **Needs Assessment**

The need to connect people has never been more urgent. A 2016 assessment of needs in Alachua County, Florida

#### **Target Audience & Demographic/Socioeconomic Characteristics**

The target audience for Bridge the GAP includes older adults (age 55+) and youth in the Alachua County community. Participation in the program is voluntary and is not limited to any type of demographic/socioeconomic characteristics, however, we anticipate that most of our program participation will reflect the characteristics of the larger Alachua County area.

#### **Program Goals, Objectives, Strategies and Details, and Resources Needed**

**Goal 1:** For older adults and youth to be connected through mutually beneficial mentor-mentee pairs.

**Objective 1.1:** In the first 12 months, enroll at least 25 older adults as mentors, age 55 and up, in the Alachua County community in order to increase social interactions with youth in the community.

**Strategies and Details:** Program staff and volunteers will actively recruit older adults in Alachua County by attending community meetings, developing professional connections with other senior service providers, and through word of mouth. Advertisement will be posted at community senior centers, senior living communities, retirement homes, libraries, and other community gathering spots. Preferably engage older adults who are interested in improving social connections, have a desire to give back to the community, and/or those who have a special interest in mentorship.

**Resources Needed:** Program staff, volunteers, paper advertisements, electronic advertisement, transportation to different locations throughout the community.

**Objective 1.2:** In the first 12 months, at least 25 children and/or teenagers age 12-18 will enroll as mentees in order to receive weekly mentorship and social engagement with an older adult.

**Strategies and Details:** Program staff and volunteers will actively recruit youth participants in Alachua County by advertising the program in places in the community, such as community centers, libraries, school newsletters, school parent-teacher-association (PTA) meetings, Boys & Girls Club, and more. It is important to build connections with leaders in the community who interact with youth, including teachers, youth group leaders, school board members, and athletic coaches.

**Resources Needed:** Program staff, volunteers, paper advertisements, electronic advertisement, transportation to different locations throughout the community.

**Goal 2:** For older adults to implement academic-focused mentorship in children with below-average academic performance to increase learning outcomes.

**Objective 2.1:** Within 1 month of enrolling, at least 10 older adults will receive basic training to be able to deliver age and grade-level appropriate academic counseling to children and teenagers.

**Strategies and Details:** Program staff will evaluate mentor interest in participating in academic counseling through an enrollment questionnaire. Mentors will receive general training about how to mentor children for academic achievement. This training is based on

the handbook titled “The Wisdom of Age: A Handbook for Mentors” (Taylor, 2015) and the “kidREACH” after-school academic tutoring curriculum (World Vision, 2015).

**Resources Needed:** Program staff to conduct training, develop enrollment questionnaire for older adult mentors, facility for training, paper handouts, pens, pencils, projector, computer, purchase “kidREACH” curriculum, download and print “The Wisdom of Age” handbook.

**Objective 2.2:** Within 1 month of enrolling, any child or teenager that exhibits academic underperformance will be placed with an older adult mentor to receive one-on-one assistance with reading, writing, or math skills every week.

**Strategies and Details:** Program staff will assess the need for academic mentorship through a parent/caregiver questionnaire, which can also be completed by a teacher if a parent or caregiver are not available. The questionnaire will include topics related to behavior, school attendance, grades, and attitudes towards learning. Children will be matched with a mentor who is trained to provide tutoring.

**Resources Needed:** Develop parent/caregiver questionnaire, secure facility for mentor-mentee pairs to meet, program staff and volunteers to supervise mentor meetings, pens, pencils, paper, books, academic curriculum or worksheets, calculators, rulers, other miscellaneous school supplies.

**Goal 3:** For children to learn new skills and hobbies in workshops taught by older adults.

**Objective 3.1:** Administer a “New Mentor” or “New Mentee” questionnaire to all older adults and youth upon enrollment into mentorship program in order to assess interest in teaching a new skill or learning a new skill.

**Strategies and Details:** All new members will complete a survey assessing their interests and needs for the program. Older adults can select to teach skills related to personal development and home economics (cooking or baking, budgeting, sewing, nutrition, relationship skills) or hobbies and sports (arts & crafts, card games, musical instruments, yoga, etc.). Children can select from a list of available topics which areas they would be interested in learning about. Mentors and mentees would be paired together based on mutual interests.

**Resources Needed:** Develop questionnaire, program staff to review answers and make mentor/mentee pairs, paper copy of questionnaire, electronic copy of questionnaire.

**Objective 3.2:** Host once per week skill or hobby building workshops for youth to learn from older adults.

**Strategies and Details:** Children enrolled in the program may attend workshops to learn new skills they are interested in. There is no limit to the number of children who attend each workshop led by an older adult. The workshops will be focused on the expertise or topic of choice of the older adult or in the areas of personal development and home economics (cooking or baking, budgeting, sewing, nutrition, relationship skills) or hobbies and sports (arts & crafts, card games, musical instruments, yoga, etc.).

**Resources Needed:** Facility to host workshops, program staff and volunteers to supervise workshops, tables, chairs, paper for lesson worksheets, equipment to accommodate special hobbies and skill teaching (yoga mats, arts and crafts supplies, food, cooking equipment, etc.).

**Logic Models for Objectives:**



The following pages contain the logic models for the subset objectives of the goals of Bridge the GAP.

**LOGIC MODEL Worksheet:**

*Goal 1: For older adults and youth to be connected through mutually beneficial mentor-mentee pairs.*

*Objective 1.1: In the first 12 months, enroll at least 25 older adults as mentors, age 55 and up, in the Alachua County community in order to increase social interactions with youth in the community.*

INPUTS	OUTPUTS		OUTCOMES		
	Activities	Outputs	Short	Intermediate	Longer term
<p>Program staff; work and time</p> <p>Volunteer staff; work and time</p> <p>Advertising concept and visual design</p> <p>Paper and electronic advertising materials</p> <p>Partnerships with providers of senior services</p> <p>Funding for staff and program supplies</p>	<p>Educate and train program staff and volunteers about organization mission and goals</p> <p>Identify locations in the community best suited to reach older adults (55+)</p> <p>Travel to locations to post advertisement or to verbally recruit older adult participants</p> <p>Program staff will provide information about enrolling in Bridge the GAP mentor program</p>	<p>In the first 12 months, enroll at least 25 older adults as mentors in the Alachua County community in order to increase social interaction with youth in the community</p>	<p>Older adults will increase social interactions with youth and feel engaged with their community.</p>	<p>Older adults will feel a sense of purpose and achievement by providing a positive influence for youth.</p>	<p>Older adults will develop a meaningful relationship with their mentee that will enhance their quality of life.</p>

**LOGIC MODEL Worksheet:**

*Objective 1.2: In the first 12 months, at least 25 children and/or teenagers age 12-18 will enroll as mentees in order to receive weekly mentorship and social engagement with an older adult.*

INPUTS	OUTPUTS		OUTCOMES		
	Activities	Outputs	Short	Intermediate	Longer term
<p>Program staff; work and time</p> <p>Volunteer staff; work and time</p> <p>Advertising concept and visual design</p> <p>Paper and electronic advertising materials</p> <p>Partnerships with providers of youth education and services</p> <p>Funding for staff and program supplies</p>	<p>Educate and train program staff and volunteers about organization mission and goals</p> <p>Identify locations in the community best suited to reach children and teenagers</p> <p>Travel to locations to post advertisement or to engage with parents and caregivers about enrolling their children</p> <p>Program staff will provide information about enrolling in Bridge the GAP mentor program</p>	<p>In the first 12 months, enroll at least 25 children/teenagers age 12-18 as mentees in the Alachua County community in order to receive weekly mentorship and social engagement with an older adult.</p>	<p>Youth will receive academic mentorship and/or learn a new hobby or skill from an older adult.</p>	<p>Youth will improve social skills and communication skills by engaging in regular meetings with an older adult.</p>	<p>Youth develop meaningful relationships with their mentor that enhance their regard and respect for older generations.</p>

**LOGIC MODEL Worksheet:**

*Goal 2: For older adults to implement academic-focused mentorship in children with below-average academic performance to increase learning outcomes.*

*Objective 2.1: Within 1 month of enrolling, at least 10 older adults will receive basic training to be able to deliver age and grade-level appropriate academic counseling to children and teenagers.*

INPUTS	OUTPUTS		OUTCOMES		
	Activities	Outputs	Short	Intermediate	Longer term
Program staff; work and time  Developed enrollment questionnaire  Funding for rental of a facility for training,  Supplies (paper handouts, pens, pencils, projector, computer)  Purchase “kidREACH” curriculum, access “The Wisdom of Age” handbook  Funding for staff and program supplies	Educate and train program staff and volunteers about mentoring curriculum  Program staff delivers training to older adults  Provide older adults with copies of academic/mentoring curriculum  Empower mentors to build positive relationships with their mentee  Engage in dialogue with mentors to address concerns or questions about mentoring	At least 10 older adults will be trained to deliver age and grade-level appropriate academic counseling to children and teenagers.	Older adults will be proficient in best-practices for mentoring youth	Older adults will successfully deliver academic-focused tutoring to youth with need for academic improvement	Children engaged in academic mentorship will have better test scores, scholastic achievement, and school attendance.  Older adults will feel a sense of purpose and commitment towards help a child to be successful.

**LOGIC MODEL Worksheet:**

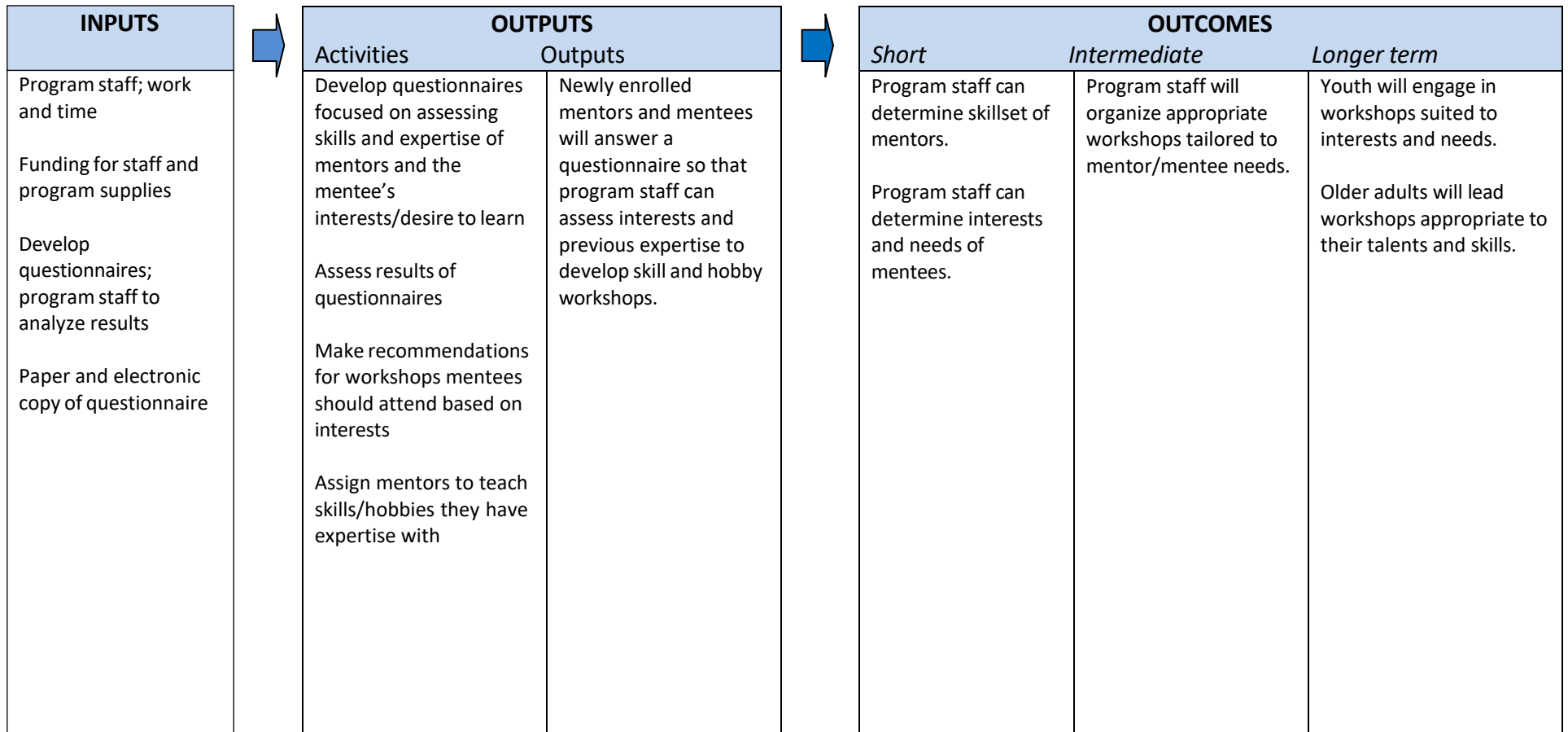
*Objective 2.2: Within 1 months of enrolling, any child or teenager that exhibits academic underperformance will be placed with an older adult mentor to receive assistance with reading, writing, or math skills every week.*

INPUTS	OUTPUTS		OUTCOMES		
	Activities	Outputs	Short	Intermediate	Longer term
Program staff; work and time  Volunteer staff; work and time  Funding for facility rental  Tables, chairs  Supplies (books, paper, pencils, pens, rulers, calculators, etc.)  Supplemental education material (worksheets and curriculum)  Parent/caregiver questionnaire; develop and assess need  Funding for staff and program supplies	Educate and train program older adult mentors based on mentoring curriculum  Program staff supervises mentoring activities  Provide older adults/mentors with copies of academic worksheets to complete with mentees  Empower mentors to build positive relationships with their mentee  Mentors will guide mentees through assignments, help problem-solve, and coach mentees to the correct answers.	Within 1 month of enrolling, a child or teenager will be identified as having academic underperformance and will receive one-on-one counseling in the subject area of need (reading, writing, math)	Children/teenagers will be engaged in a supportive and productive learning environment by interacting with an adult one-on-one.	Children will develop a more positive attitude towards learning.  Older adults/mentors will celebrate academic successes and encourage continued growth.	Children engaged in academic mentorship will have better test scores, scholastic achievement, and school attendance.

**LOGIC MODEL Worksheet:**

*Goal 3: For children to learn new skills and hobbies in workshops taught by older adults.*

*Objective 3.1: Administer a “New Mentor” or “New Mentee” questionnaire to all older adults and youth upon enrollment into mentorship program in order to assess interest in teaching a new skill or learning a new skill.*



**LOGIC MODEL Worksheet:**

*Objective 3.2: Host once per week skill or hobby building workshops for youth to learn from older adults.*

INPUTS	OUTPUTS		OUTCOMES		
	Activities	Outputs	Short	Intermediate	Longer term
<p>Program staff; work and time</p> <p>Funding for staff and program supplies</p> <p>Funding for facility rental</p> <p>Tables, chairs</p> <p>Supplies for skill/hobby teaching (yoga mats, arts and crafts supplies, food, cooking equipment, etc.</p> <p>Funding for supplies</p>	<p>Program staff supervises mentoring activities</p> <p>Mentors lead workshop focused on a particular skill or hobby</p> <p>Mentees attend workshop and engage in hands-on learning</p>	<p>Youth will engage in hands-on learning of a skill or hobby one time per week at a workshop led by an older adult mentor</p>	<p>Youth learn a new skill or hobby</p> <p>Older adults provide knowledge and expertise</p>	<p>Older adults engage in social activity and stewardship by passing on valuable skills</p> <p>Youth have a positive role model to help them achieve their goals</p>	<p>Youth are better equipped to manage their daily lives and engage in fun, positive activities</p> <p>Older adults have a sense of accomplishment by passing along their legacy, passions, wisdom, and expertise</p>

## **Program Evaluation Plan**

### **Structure of Process and Outcome Evaluation**

It is important that Bridge the GAP conducts regular and standardized program evaluation in order to ensure that all activities are in alignment with goals, objectives and the organizational mission. The information used to evaluate Bridge the GAP programs will be qualitative and quantitative. We will collect entrance and exit questionnaires for program mentors and mentees. We will also assess the pre vs. post scores on an academic aptitude test and gather information about school performance for mentees receiving academic counseling. Finally, we will interview mentors and mentees on a quarterly basis to gather information about program successes, behavior change, attitude change, and barriers to success. We will begin with our evaluation process whenever a new mentor or mentee enrolls in the program and they will be followed throughout their time in the program. Every quarter, the evaluation team will meet and to interpret and discuss the evaluation data. The evaluation team will create a summary of the results to be delivered to the Executive Director and the Board of Directors. Changes will be made to program delivery if evaluation data indicates any area in need of improvement. The primary purpose of evaluation is to ensure successful outcomes are met.

### **Identification of Evaluation Team**

The Bridge the GAP evaluation team will be composed of an in-house evaluation team supported by an outside consultant. The in-house evaluation team will be program staff members. The consultant will be a professional with experience with nonprofit program evaluation and some knowledge of behavior change interventions, interpersonal relationship building, and academic benchmarks for children. The consultant will help lead the quarterly



evaluation team meetings and help author an evaluation report for the Executive Director and Board of Directors.

### **Target Audience for Evaluation**

The purpose of evaluations is to monitor the success of mentor/mentee relationships. The Executive Director, program coordinators, staff, and volunteers will use the information gathered to understand what additional structure and resources we should provide to mentors and mentees in order to achieve desired outcomes. The evaluation process will be critical in the first 12 months of the program in order to ensure mentor/mentee retention and engagement in the programs. The Board of Directors can use evaluation data to gauge whether programs support the mission. Proven successful outcomes will provide evidence for referrals and continued participation from the community.

### **Evaluation Questions**

Evaluation questions are an important component of quantitative and qualitative data collection. These questions may be included in either mentor/mentee questionnaires or interviews. Participants in our program will be evaluated using these questions. Below is a list of planned evaluation questions:

Process Evaluation:

- How did mentors and mentees hear about Bridge the GAP programs?
- Why did mentors and mentees decide to join Bridge the GAP programs?
- What were the demographic characteristics of mentors?
- What were the demographic characteristics of mentees?

- Are staff and volunteers adequately educated and trained to provide leadership and instruction for mentors/mentees?
- What do mentors and mentees hope to gain from the program?
- What do mentors and mentees desire to contribute to the program?
- Do mentors and mentees feel that facilities and structure of program are conducive to success?
- Are mentors and mentees communicating appropriately and effectively?

#### Outcome Evaluation:

- Do mentees show academic improvement by engaging in academic mentor programs?
- Are youth and older adults fostering positive relationships?
- What attitudes do participants hold about their identity as a mentor or mentee?
- Do older adults feel engaged and socially connected?
- Are youth learning new skills and hobbies?
- What are the medium-term and long-term impacts of the programs?
- How can programs be modified to increase participation and success?
- What is the perceived benefit from participating as a mentor or mentee?

#### **Methodology, Data Collection, and Analysis**

Bridge the GAP will gather evaluation data through a variety of mediums.

Questionnaires for mentors, mentees, and parents/caregivers will be delivered on paper or can be completed electronically. The evaluation team will also conduct brief interviews focused on evaluating behavior change, attitudes, and personal successes and barriers. The interviews will be conducted in the same setting and using a script so that all interviewers will gather the same

data. Interviews will be audio recorded with interviewee permission and will only be shared with the evaluation team. Interviewers will be trained to ask open-ended questions, ask probing questions, and provide affirmations in order to get in-depth, personal information from interviewees. Quantitative and qualitative data will be collected at the end of the quarter and combined in statistical or narrative format when appropriate. Raw data will be reviewed by the evaluation team and the evaluation consultant.

### **Evaluation Reporting**

A quarterly evaluation report will be completed by the evaluation team and the evaluation consultant. All program staff, volunteers, members of the board, and the executive director will have permission to view the evaluation report. The Board of Directors and Executive Director will receive printed copies. An electronic version will be made available to be viewed by program staff and volunteers. A quarterly activity report and outcome evaluation summary will be developed in plain language and provided to community stakeholders, including senior service providers, community centers, school officials, and more. The summary will be visually appealing and will provide clear information about outcomes of participation in Bridge the GAP programs. A press release with summary information will be posted on the Bridge the GAP website and social media.

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## **Section 6: Human Resources Management**

### **Paid Staffing Needs**

Bridge the GAP will have a staff of 10 paid employees. The full-time employees will be known as the Core Staff and includes the Executive Director, Education Director, Outreach Director and Human Resources/Finance Director. The Core Staff will be full-time, exempt-salary employees. Other paid, part time positions will include two facilities managers, a social worker, two mentor coaches, and one volunteer coordinator. These positions are non-exempt hourly positions. The Executive Director and Core Staff will continue to assess organizational needs and funding and change the paid staffing model as appropriate. As more mentors and mentees join Bridge the GAP, there may be an increased need to hire full time mentor coaches and full-time facilities managers.

### **Job Position Descriptions**

*Executive Director:* reports to the Board of Directors and is responsible for providing leadership and policy guidance, managing and directing programs and activities, implementing policy decisions, approving financial expenditures, hiring staff, evaluating staff, and maintaining all documentations and records. The Executive Director is preferably someone who can motivate staff, build strong community relationships, inspire program participants, and communicate clearly and effectively. Qualifications include a bachelor's degree, prior experience working in the nonprofit sector (minimum of 2 years) and supports Bridge the GAP's mission. A strong understanding of the community, stakeholders, and fundraising is required. Preferred minimum commitment to serve as Executive Director for 4 years.

*Education Director:* reports to the Executive Director. Education Director is responsible for organizing and coordinating mentor training, designing methods to assess educational needs, grant writing, reporting outcomes, assessing mentor and mentee satisfaction with current programming, overseeing facility management, and updating resources for academic mentorship. Education Director works directly with facilities managers and mentor coaches. Skill and hobby workshops are coordinated by the Education Director. Qualifications include a bachelor's degree, prior experience working in the nonprofit sector (minimum of 2 years) and supports Bridge the GAP's mission.

*Outreach Director:* reports to the Executive Director. Responsibilities include: developing and executing fundraising plans, securing support from the community, actively recruiting mentors and mentees to participate in programming, communicating with parents and legal guardians of mentees, developing advertising material, creating and implementing an Annual Recruitment Plan for mentors, participating in media engagement, coordinating fundraising events, organizing donor registries, grant writing, planning and managing special events, and coordinating inquiries about joining Bridge the GAP programs. Outreach Director works with mentor coaches and volunteers. The Outreach Director should have experience working in a public institution, particularly schools or local government, so as to best establish a line of communication with stakeholders. Qualifications include a bachelor's degree, prior experience working in the nonprofit sector (minimum of 2 years) and supports Bridge the GAP's mission.

*Human Resources/Finance Director:* reports to the Executive Director. Responsibilities include: new staff and volunteer orientation, providing referrals for other community agencies to mentors and mentees, providing human resources to employees, connecting program

participants with a social worker when needed, payroll processing, labor law compliance, general office management, generating a yearly budget, budget reporting, organizing financial statements, attend Board of Director's meetings for quarterly budget reporting, overseeing and approving purchase of supplies and materials, communicating with internal staff.

Communication, organizational, reliability, and integrity above average. Qualifications include a bachelor's degree, prior experience working in the nonprofit sector (minimum of 2 years), accounting and bookkeeping experience, and supports Bridge the GAP's mission.

*Facilities Manager:* reports to the Education Director and works part-time to locate, secure, and set-up locations throughout the community to hold programs. Facilities Manager must be responsible, proactive, organized and a strong communicator in order to ensure facilities are safe, clean, and provide adequate space for programs. Responsibilities include: conducting a needs assessment for facilities based on Bridge the GAP program sizes, visit facilities prior to each planned event to set-up, sign agreements with facility hosts, create and update a facilities database, work with Education Director and Finance Director to provide compensation for facilities rentals, attend all Bridge the GAP programs. Qualifications include minimum 1-year managerial experience.

*Mentor Coach:* reports to Education Director and works part-time to train new mentors and facilitate healthy, productive mentor-mentee relationships. Responsibilities include: hosting new mentor orientations, developing relationships with mentors, coaching mentors and providing guidance, attend all programming, and gather feedback from mentors and mentees about program successes. Preferable that mentor coach is outgoing, a strong communicator,

and empathetic. Qualifications include minimum of 1 year in a counseling setting or related field. Bachelor's degree is preferred.

*Social Worker:* reports to the Outreach Director and the HR Director and works on a per diem basis on cases identified by the Outreach and HR Directors. Responsibilities include establishing trust with mentors and mentees referred to the Social Worker, working on case resolution, referring cases to appropriate organizations and agencies when necessary, developing quarterly reports for the Board of Directors, and supporting the mission and values of Bridge the GAP. Qualifications include a bachelor's degree in social work. Applicants who are Certified Master Social Workers (CMSW) or Licensed Clinical Social Workers (LCSW) are preferred.

*Volunteer Coordinator:* reports to the HR Director and works to recruit, engage, and communicate with Bridge the GAP volunteers. Responsibilities include creating and updating a volunteer registry, recruiting volunteers from the community, gathering volunteer records, creating a quarterly Volunteer Report, communicating with stakeholders, training new volunteers, and writing and updating a volunteer handbook. Volunteer Coordinator must be organized and a strong communicator. Qualifications include minimum of 1 year in a management position and/or a bachelor's degree.

### **Recruitment Process and Strategies**

It is the primary goal that Bridge the GAP employees display a good level of "fit" in the organization. Overall, when recruiting new employees, it is important to clearly describe the job position, job requirements, and expectations. The Bridge the GAP mission is to empower youth and elderly adults through mutually beneficial experiences focused on practical skill building,



academic improvement, and socialization. Prospective employees should demonstrate knowledge and understanding of the issues addressed by Bridge the GAP and a strong desire to be leaders in serving Bridge the GAPs mission. Additionally, we will hire people who demonstrate values in alignment with our organizational values, compassion, are proactive, are passionate about community engagement. Job positions and job offers will be written by the Board of Directors and Executive Director. All job positions will be compliant with federal, state, and local employment laws. These laws include, but are not limited to, The Equal Pay Act of 1963, Title VII of the Civil Rights Act of 1964, The Age Discrimination in Employment Act of 1967, Occupational Safety and Health Act of 1970, The Equal Employment Opportunity Act of 1972, The Pregnancy Discrimination Act of 1978, The Americans with Disabilities Act of 1990, and The Family and Medical Leave Act of 1993. Job positions will be advertised online and in person. Specific websites will be utilized, including the Bridge the GAP website, Zip Recruiter and Indeed, job position and recruitment databases. Community organizations and stakeholders will also be engaged. Due to close proximity to University of Florida in Alachua County, Bridge the GAP will establish a relationship with academic advisors to recruit new graduates. Bridge the GAP will also attend annual student involvement fairs and biannual job fairs to advertise open positions. Another important relationship for recruiting prospective employees includes Santa Fe Community College. Once applicants complete a job application, the Board of Directors and the Executive Director will review applicant qualifications and will extend an invitation for an in-person interview. The Board and the Executive Director will conduct the interview, which will include questions about personality, job experience, and hypothetical scenarios, in order to assess applicant suitability to the Bridge the GAP culture. At

least three personal references that can attest to personal and professional demeanor must be provided. If qualified for the position, the applicant will receive a job offer. Upon acceptance of the job offer, the HR Director will conduct new employee training and orientation.

## **BRIDGE THE GAP- PERSONNEL POLICIES- EFFECTIVE NOVEMBER 2018**

### **EMPLOYMENT**

Employment at Bridge the GAP is based wholly on qualifications, competence, experience, training and fitness for the job. Because of the importance of our work in serving the community, we make every effort to fill vacancies in accordance with the above stipulations. At the time of employment each person will receive a confirmation of employment letter which outlines job title, salary, etc. Further, each person will receive a copy of the job description and Bridge the GAP Personnel Policies. When a job is available at Bridge the GAP, the Director is responsible for seeing that all staff members are informed about the opening. Recruitment, screening, and selection will normally be done by the Director, assisted by members of the senior staff. At the discretion of the Director, members of the Board may be invited to participate in screening, interviewing and selection.

### **STATEMENT OF NON-DISCRIMINATION**

Bridge the GAP will not discriminate against any employee or applicant on the basis of race, color, religion, sex, national origin, physical or mental handicap, political belief, marital status, age, or sexual orientation. Bridge the GAP complies with all Equal Employment Opportunity and Americans with Disabilities Act laws and regulations in the areas of hiring, compensation, benefits and promotion.

### **MANAGEMENT RIGHTS**

Bridge the GAP retains the exclusive right to hire, direct and schedule the work force; to plan, direct and control operations; to discontinue or reorganize or combine any department or branch of operations with any consequent reduction or other changes in the work force; to hire and terminate employees; to promulgate rules and regulations; to introduce new or improved methods or facilities regardless of whether or not the same causes a reduction in the work force and in all respects to carry out, in addition, the ordinary and customary functions of management. None of these rights shall be exercised in a capricious or arbitrary manner.

### **ORIENTATION**

Orientation of new employees will include the following: Review of the employee's job description and core standards for evaluation. Review of these personnel policies and practices

Review of general policies and procedures of Bridge the GAP. Review of the employee's job title, salary and compensation agreements, work hours, time sheets and other record-keeping methods and pay practices, standards for employee conduct, attendance and punctuality.

### **PROBATIONARY PERIOD**

All new employees are required to serve a minimum 90-day probationary period during which employment may be terminated at the discretion of the Director without recourse to the standard procedure for termination specified in our policies. This period may be extended at the discretion of the supervisor. If the immediate supervisor and/or Director find the probationary employee's work unsatisfactory, this should be indicated to the employee as early as possible in the probationary period. No formal statement of cause is required but an informal explanation would normally be expected. Employees do not begin to accrue leave and are not entitled to join the Bridge the GAP health, dental, long-term disability or pension plans until the successful completion of the probation period. The Director may authorize leave with pay for illness or other emergencies with the understanding that should the employee not continue with Bridge the GAP after the 90-day probation (or long enough to earn the advanced leave), Bridge the GAP would reduce the employee's last paycheck by said number of days.

### **EMPLOYEE STATUS**

A *temporary* employee is a person engaged on a full or part-time basis for a definite period, usually six months or less. An *occasional* employee is a person hired on a fee or hourly basis for special tasks not covered by the regular staff. A *regular* employee is a person hired full-or part-time (for an indefinite period) to fill a specific position. A *consultant* is not an employee of Bridge the GAP but a self or otherwise employed person with whom Bridge the GAP may contract for specific tasks or services.

Full-time: An employee who is regularly scheduled to work a minimum of 40 hours per week.

Part-time: An employee who is regularly scheduled to work less than 40 hours per week.

Employees working less than 30 hours per week are not entitled to health benefits and other optional benefits. Part-time employees accrue vacation days on a pro-rated basis and are entitled to paid holidays only if they normally work more than 20 hours per week, and then only those holidays which fall upon the days on which they normally work.

Temporary: An employee who is hired for a predetermined period of employment, which may be carried out on full-time, part-time or occasional basis.

Regular Employee: A full or part-time employee hired with the expectation that the working relationship will be continued as long as it is mutually satisfactory and financially sustainable.

### **HOURS OF EMPLOYMENT**

**Full-time work** is generally assumed to occur Monday through Friday between the hours of 9:00 a.m. and 5:00 p.m., with one hour lunch designated for lunch. At the discretion of the Director, flexible hours may be arranged if these will not interfere with the accomplishment of the organization's task and goals. Employees who regularly work outside normal hours can arrange for adjusted hours. Bridge the GAP staff titles of Office Manager are considered to be

nonexempt and will be duly compensated for time beyond the 40 hour week. There is no provision for paid overtime or compensatory time for exempt employees. Employees who experience a delay or emergency which will require them to be more than 30 minutes late in arriving should notify a member of the management team of their expected arrival time.

### **ATTENDANCE**

Federal, State and City laws require Bridge the GAP to maintain accurate records of all employees' time and attendance. Each employee must complete and submit time sheets weekly. Falsification of time and attendance records may result in disciplinary actions.

### **PERFORMANCE REVIEW**

Each employee is entitled to a probationary and annual performance review. A performance review is normally conducted by the Director or the Director's designee. Goals and priorities will be established for the next work period. A performance review form should be signed by the employee and the person conducting the review, with a copy in the employee's personnel file and a copy retained by the employee. Review and planning meetings are intended primarily as a means for promoting communication and improving performance and form the basis for salary determination. In the event that an employee should desire another job within Bridge the GAP or a letter of reference after leaving the organization, it is anticipated that performance reviews will provide useful information.

### **SALARIES**

Bridge the GAP is subject to a number of constraints in the determination of salaries. Salaries of some positions are governed by the amounts proposed in proposals and contracts which are in turn derived from the "going rate" available from foundations and government agencies. Furthermore, all salary increases must be made conditional upon raising sufficient money to cover the projected budget. Within these constraints, the normal procedure is that a salary range is established for each position created, the Director specifies a salary at the time of hiring, and salaries are reviewed annually by the Director at budget preparation time. The Director's salary is reviewed annually by the Board of Directors.

### **LEAVES AND HOLIDAYS**

Holidays: The office is closed and all regular staff will be paid for the following holidays: New Year's Day, Martin Luther King's Birthday, Washington's Birthday Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Thanksgiving Day, the day after Thanksgiving, Christmas Day. The office may close early the day before a major holiday or the day after at the discretion of the Director; staff will be notified in advance. When Christmas, New Year's Day or Independence Day falls upon a weekend, a nearby workday will be designated instead. Other holidays will be celebrated on the date designated.

Vacation: The following is the vacation policy for all full-time employees of Bridge the GAP:

<b>Length of Service (In years)</b>	<b>Weeks of Vacation</b>	<b>Accrual Rate (Days per month)</b>
0 through 4 (inclusive)	3	1.25
5 or more	4	1.66

Vacation is to be used in the best interest of Bridge the GAP. Schedules will be arranged on the basis of seniority. Subject to the Director's approval, employee's may carryover up to 5 days of vacation into the next quarter. Vacation time accrues upon completion of the probation period. In addition, for terminating employees, pay will be given for unused vacation time provided that the employee was on staff for six months or more of continued employment, the required written notice of resignation was given and the employee was not terminated for gross malfeasance. Part-time employees are entitled to pro-rated time for vacation leave.

Sick Leave: Full-time employees who successfully complete probation are entitled to sick leave, for a maximum of 8 days per year, of paid sick leave. Absences due to illness or medical appointment may be charged to sick leave. Before returning to work from a sick leave absence of five (5) calendar days or more, an employee must provide a physician's verification that he or she may safely return to work. Unused sick leave does not carry over to the next fiscal year, and no pay is given in lieu of sick leave. Unused sick leave lapses without compensation on an employee's leave Bridge the GAP. Sick leave is to be taken in the event of the illness of an employee or, of the employee's dependent child; it is not an all-purpose leave. Extended sick leave for a serious illness may be allowed by the Director. Employees who anticipate that an extended period of absence may be necessary should discuss the matter with the Director to see if disability benefits may be available. Part-time employees are entitled to pro-rated time for sick leave. After 5 consecutive days of absence due to illness, an employee should file for short-term disability. Employees should call a member of the senior staff within 1/2 hour of starting time on the first day of absence. Employees whose illness extends beyond one day must advise their supervisor of their expected day of return.

Parental Leave: Employees who become parents, either by birth or adoption, may receive a total of 3 months leave. During this time, employees will first be required to use any accrued sick and/or vacation time. The amount of sick and/or vacation time used will be the total accrued amounts as of the last day of work before the leave begins. The balance of the leave will be without pay although employees will continue to accrue sick leave to be used upon return. At the discretion of the Director, an employee may be carry up to 5 days of accrued vacation leave into the first quarter of the subsequent fiscal year, and/or may be granted additional time off without pay. For the first 90 days of leave, Bridge the GAP will continue to pay the employee's medical, dental and long-term disability premium's as well as its share of the cost for family coverage of the same. Where applicable, employees are expected to make arrangements for their payments for the same. If leave is extended past the 90 days, the employees must make arrangements for covering the full share of the premiums. Following maternity/paternity leave an employee may return to the same position held by the employee when the leave commenced, if available, or to a position of substantially similar status, benefits and pay.

Disability Leave of Absence without Pay: Accrued sick leave may be used during medically verified disability. A request for medically verified disability should be approved by the Executive Director and a statement for the reason for the leave and intention to return to work at a specified date should be included. A disabled worker is entitled to 60 days of job protection.

Jury Duty: Full-time employees who have completed their probationary period and who are called to serve as jurors or are subpoenaed to appear before a court as a witness will receive their regular pay minus any jury duty pay or witness fee received for each work day while in court for jury duty or as a witness. The receipt of a notice to report to jury duty or of a subpoena shall be reported immediately to the Director and/or member of the senior staff. [ABC] reserves the right to request that the employee be exempted from jury duty if the employee's services are essential.

Military Leave: A full-time employee who is a member of an organized reserve unit of the Armed Forces of the United States of the National Guard and who attends a regular military camp will be granted the time necessary to meet his/her obligation. A full-time employee who is a member of an organized reserve unit of the Armed Forces of the United States or the National Guard who is called into active duty shall be granted a military leave of absence for the period for which they are called. An employee must give the Executive Director immediate notice of the dates of intended absence. In the case of active duty, the employee shall report for work at Bridge the GAP no later than five days following discharge from active duty. Bridge the GAP cannot guarantee that any employee will return to the same position which they filled prior to the active duty, but will make every effort to provide an equivalent position. Military leave will not be counted against vacation days, but will instead be considered to be on a leave of absence without pay.

## **FRINGE BENEFITS**

Health Insurance: Full-time employees are provided with medical insurance. Details of each are outlined in separate brochures given to each employee. Because of fiscal constraints, payment for coverage under this plan is shared by Bridge the GAP and the employee on a co-payment arrangement. Exempt employees contribute 50% and non-exempt employees contribute 20% respectively. Terminating employees will be told of the status of their insurance, when it will expire and what options are available for converting coverage, i.e. COBRA. Employees are eligible for to participate in the above plans upon completion of the probation period. Unemployment insurance, worker's compensation and short-term disability coverage is provided as required by law.

## **RESIGNATION**

In the event of resignations after the probationary period employees are expected to give notice equivalent to their annual vacation entitlement. An employee, who gives notice of

resignation, as provided above, shall be entitled to receive payment for unused vacation accrued on the effective date of resignation.

### **TERMINATION**

If the Director wants to consider termination of employment, the employee must be given a written statement of the specific problems, a definite period must be set within which the employee may try to correct the problem, and if the problem cannot be resolved, the employee must be given two weeks' notice. Bridge the GAP does not provide severance pay. In the case of gross malfeasance, Bridge the GAP reserves the right to terminate employees immediately. Upon termination, the key to the office should be turned in to the Executive Director or another member of the senior staff on the last day of employment. The employee is also responsible to give a status report on all current work, present files and other materials in a clear manner to the Executive Director or a delegated representative. Any employee who is terminated may appeal the decision to the Board by writing a letter to its Chairperson. The Board's decision shall be final. Any employee who has completed the probationary period and has attained regular status may not be dismissed except upon written notice and an opportunity to be heard. In no case will an employee be dismissed because of an unlawful discrimination preference.

#### **Grounds for dismissal include but are not limited to:**

- Neglect of duties
- Absence without leave or failure to report after authorized leave has expired or after such leave has been disapproved.
- Physical or mental incapacity to perform his/her duties.
- Insufficiency in the performance of duties as reflected in the evaluation.
- Violation of lawful directives (written or verbal), policy or direction given by an immediate supervisor, or the failure to obey any lawful or reasonable direction when such violation amounts to insubordination or serious breach of discipline.
- Conduct unbecoming to an employee of Bridge the GAP during working hours, which may discredit the organization.
- Offensive conduct or language toward the public or community, supervisor or administrative personnel.
- Criminal, disorderly or immoral conduct while on duty.
- The violation of policies or directives of Bridge the GAP Board of Directors.
- Negligence or willful damage to Bridge the GAP property or waste of agency supplies and equipment.
- Misrepresentations or false statements on applications, or Bridge the GAP programs or operations.
- Intoxication/use of drugs during working hours and not in control of mental or physical faculties.

### **GRIEVANCE PROCEDURES**

Whenever an individual believes that a situation, condition, or event related to their employment or status is unsatisfactory, and is subject to the control of Bridge the GAP, they will be expected and encouraged to take every reasonable step to resolve their complaints informally. These efforts must include discussions with the Executive Director and/or immediate supervisor. Efforts to resolve a grievance at the informal stage is mandatory and all parties shall exercise their best efforts to determine an equitable solution to the grievance, complaint or problem.

**Formal:** If all reasonable, informal efforts to resolve a complaint fail, the individual may formalize the complaint as a grievance by placing the complaint in writing; stating specifically the nature, the dates and times and the alleged problem; listing the individuals thought to be responsible; and stating concisely the relief or remedy sought for the grievance. All grievances shall be signed by the individual submitting the matter for review. The individual shall file any formal grievance within two weeks from the time the grievance is, or reasonably known. The individual shall submit the written formal grievance to the Executive Director who shall acknowledge its receipt in writing and shall conduct an appropriate inquiry or investigation into the facts. The Executive Director in conjunction with the Board may grant the grievance, deny the relief requested, or provide such other remedy as is deemed just and reasonable. The Executive Director's decision shall list the findings, the reasons for the conclusions reached, and the proposed resolution and shall be issued no later than two weeks after the receipt of the grievance. All grievance matters become a formal insert into an employee's personnel folder. The informal process described above, if followed and resolution is reached, need not be part of such records.

#### **OTHER POLICIES AND REGULATIONS**

**Staff Meetings:** Staff meetings are traditionally held twice a month. All staff is expected to attend unless excused.

**Copyrights:** As a condition of employment, each employee/consultant agrees that all copyrights to published materials by or relevant to Bridge the GAP and its programs, written by an employee/consultant, belong to Bridge the GAP. Authorship will be credited to the individual employee/consultant involved, if relevant.

**Employment at Will:** The description of current policies should not be construed as a contract of employment or as a statement that these policies will not change. Continued employment of an individual shall be at the will of the employer, subject only to the applicable laws forbidding discrimination.

**Conflict of Interest:** No person, employed or appointed by Bridge the GAP, shall conduct themselves in a manner which creates by law or in the judgment of the Board of Directors a conflict of interest with the interests of Bridge the GAP, at no time shall a person represent themselves as employed by Bridge the GAP when not performing work on behalf of Bridge the GAP.



**Statements regarding/Representation of Bridge the GAP:** Formal representation (like staff participating on Boards as) and public statements, both written and verbal regarding Bridge the GAP shall be made only with the approval of the Executive Director. These include press releases, interviews, proposals, speeches, training sessions, advertisements, brochures and other public relations materials.

**Confidentiality of Patient Information:** Bridge the GAP is legally and contractually obligated to provide all reasonable assurances that all patient information is confidential. Bridge the GAP employees possess detailed information regarding patients. Information shared in materials and discussions and even the fact that a given patient is a Bridge the GAP patient, must be kept within the agency structure and must be considered internal, to be shared among agency staff. Exceptions to this rule can be made by the Director. Bridge the GAP conforms to all Health Insurance Portability and Accountability Act (HIPAA) regulations regarding patient information. Please refer to Bridge the GAP's Corporate Compliance Program for details.

**Drug Free Workplace:** The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited at Bridge the GAP. Employment will be immediately terminated if any employee is found to be engaged in any such activities. In the event that any employee has a problem with alcohol or drug abuse and wishes to participate in a rehabilitation or special assistance program, the employee should speak to a member of the management team. Bridge the GAP will work with the employee to find appropriate treatment.

### **Training and Retention**

A critical component of the hiring and job training process is education about the Bridge the GAP mission. Employee "buy-in" to the organization's mission, vision, and core values will ensure that the employee feels connected to Bridge the GAP and thus, is motivated to continue working with the organization. The training process will be intentionally focused on inclusivity, interest in getting to know the new employees, and orienting them to the organizational culture. Establishment of a strong support network and open lines of communication will allow new employees to feel valued and respected in their positions at Bridge the GAP. In order to make sure that new employees feel embedded in the organizational culture, the Executive Director and the Human Resources Director will have a discussion with each new employee during their orientation and will ask for their personal vision and ideas for the direction of the

organization. Because Bridge the GAP aims to create a strong community support system and values friends and family, all employees and their families will be encouraged to participate in monthly team social gatherings. Employees will be encouraged to meet with HR to discuss any concerns or ideas for improvement for the workplace environment and the Executive Director will review the suggestions on a weekly basis, in order to make sure there is efficient and satisfactory response to employee requests. Employees will be encouraged to maintain a healthy work-life balance and should feel comfortable with setting boundaries around work and personal life when necessary.

Training and orientation will take place upon completion of the hiring process. The purpose of the training is to clearly describe job duties, expectations for employees of Bridge the GAP, increase knowledge and awareness of organizational policies and procedures, and to introduce new employees to the Bridge the GAP staff. A conscious effort will be made by the Human Resources Director to conduct new employee training in an informal, supportive and respectful setting and will give the new employee the opportunity to ask questions and reflect on the information provided during orientation. (HR Council, 2016) During the time of employment at Bridge the GAP, employees are highly encouraged to participate in professional development and or leadership activities, of which have the possibility of being funded by Bridge the GAP.

Employee engagement and retention is critical. (HR Council, 2016) Bridge the GAP is dedicated to finding and training the best and most capable talent to serve this organization. Therefore, we believe it is important to develop policies and programs to reward our employees. Competitive salary and benefits will be offered to paid employees. All employees

will be engaged in annual reports to help develop operational plans for the organization. Workplace wellness programs and wellness promotion will be a focus because a healthy workplace means more productive and happier employees. (HR Council, 2016) Thank you notes and employee recognition will be provided whenever appropriate. Overall, Bridge the GAP has a goal to recruit, train, and retain talented and compassionate individuals to help bring our organizational mission to life.

### **References for Section 6: Human Resources Management**

HR Council (2016). Learning, Training & Development. Retrieved from

<http://www.hrcouncil.ca/hr-toolkit/learning-implementing.cfm>

Kumaran, M. (2018) Module 6: *Leadership and Human Resources Management* [PDF]. Retrieved

from <https://ufl.instructure.com/courses/357626/pages/week-6-leadership-and-human-resources-management>

Kumaran, M. (2018) Module 9: *Volunteer Management* [PDF]. Retrieved from

<https://ufl.instructure.com/courses/357626/pages/week-9-volunteer-management>

## Section 7: Financial Statements

### Annual Budget for the First Fiscal Year

#### Fiscal Year 2018

<b>Revenue</b>	<b>Budget (USD)</b>
Grants	250,000
Individuals	18,000
Private Foundations	4,000
Corporations	10,000
Fundraisers and Special Events	7,500
<b>Total</b>	<b>357,000</b>
<b>In-Kind</b>	<b>3,000</b>
<b>Total Revenue</b>	<b>360,000</b>

<b>Expenses</b>	<b>Budget (USD)</b>
Staff Salaries and Wages	136,000
Payroll Taxes	13,600
Health Insurance Premiums	25,000
Lease	12,000
Utilities	11,000
Education Materials	6,000
Marketing Materials	3,000
Technology and Equipment	12,000
Staff and Volunteer Training	1,500
Board Retreat	1,800
<b>Subtotal</b>	<b>221,900</b>

<b>In-Kind</b>	
Volunteer hours	130,000
<b>Total In-Kind</b>	<b>130,000</b>
<b>Total Expenses</b>	<b>222,000</b>
<b>Revenue over Expenses</b>	<b>138,000</b>

### Statement of Financial Position

As of December 31, 2018

<b>Assets</b>	<b>USD</b>
Cash and Cash Equivalents	\$ 8,300
Grants Receivables	\$ 120,000
Accounts Receivables	\$ 3,500
Deposits on leased properties	\$ 4,000
Unconditional promises to give (confirmed)	\$ 12,500
Short-term investments	\$ 7,000
Long-term investments	\$ 18,000
Property and equipment	\$ 12,000
Other	\$ 31,000
<b>Total Assets</b>	<b>\$ 216,000</b>
<b>Liabilities and Net Assets</b>	<b>USD</b>
<b>Liabilities</b>	
Accounts Payable	\$ 8,200
Line of credit	\$ 40,000
<b>Total Liabilities</b>	<b>\$ 48,200</b>
<b>Net Assets</b>	
Unrestricted	
Designated	\$ 120,000
Undesignated	\$ 17,600
Temporarily restricted	\$ 10,200
Permanently restricted	\$ 20,000
<b>Total Net Assets</b>	<b>\$ 167,800</b>

**Total Liabilities and Net Assets \$ 216,000**

**Statement of Activities**

**Year Ended December 31, 2018**

	USD	USD	USD	USD
<b>OPERATING REVENUES AND OTHER SUPPORTING</b>	<b>Unrestricted</b>	<b>Temporarily Restricted</b>	<b>Permanently Restricted</b>	<b>Total</b>
Contributions				
Government grants	200,000	50,000	-	\$ 250,000
Private Foundation grants	4,000	-	-	\$ 4,000
Contributions-public	18,000	-	-	\$ 18,000
Contributions-in-kind	3,000	-	-	\$ 3,000
Special events	5,000	-	-	\$ 7,500
Investment return	7,000	-	-	\$ 7,000
Other revenue	5,300	-	-	\$ 5,300
<b>TOTAL OPERATING REVENUES AND OTHER SUPPORT</b>	<b>244,000</b>	<b>50,000</b>	<b>-</b>	<b>\$ 294,800</b>
<b>OPERATING EXPENSES</b>				
Program services	140,000	-	-	\$ 140,000
Supporting services	-	10,000	-	\$ 10,000
Fundraising	18,000	4,000	-	\$ 22,000
Management and general	90,000	-	-	\$ 90,000
<b>TOTAL OPERATING EXPENSES</b>	<b>248,000</b>	<b>14,000</b>	<b>-</b>	<b>\$ 262,000</b>
<b>CHANGE IN NET ASSETS</b>	<b>-4,000</b>	<b>36,000</b>	<b>-</b>	<b>\$ 32,000</b>

<b>NET ASSETS AT BEGINNING OF YEAR</b>	190,000	-	-	\$ 190,000
<b>NET ASSETS AT END OF YEAR</b>	186,000	36,000	-	\$ 222,000

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### Statement of Cash Flow

**Year End December 31, 2018**

	<b>USD</b>
Cash Flows from Operating Activities:	
Change in net assets	\$ 32,000
Adjustment to reconcile change in net assets to net cash flows from operating activities	
Depreciation	\$ 8,000
Realized and unrealized losses/gains on investment	\$ 2,000
Change in assets and liabilities	
Grants receivable	\$ (50,000)
Accounts receivable	-
Accounts payable	\$ 2,200
<b>NET CASH FLOWS FROM OPERATING ACTIVITIES:</b>	<u>\$ (5,800)</u>
Cash Flows from Investing Activities:	
Purchases of equipment	\$ (12,000)
Purchases of investments	\$ (40,000)
Proceeds from sales of investments	\$ 7,000
<b>NET CASH FLOWS FROM INVESTING ACTIVITIES:</b>	<u>\$ (45,000)</u>
Cash Flows from Financing Activities:	
Lease payment	\$ (1,000)
<b>NET CASH FLOWS FROM FINANCING ACTIVITIES:</b>	<u>\$ (1,000)</u>
<b>NET DECREASE/INCREASE IN CASH AND CASH EQUIVALENTS:</b>	<u>\$ (51,800)</u>

Cash and Cash Equivalents

Beginning

\$ 8,300

Ending

\$ (43,500)

**References for Section 7: Financial Statements**

Chartered Professional Accountants Canada. (2012). A Guide to Financial Statements of Not-For-Profit Organizations. Questions for Directors to Ask. Retrieved from <https://www.cpacanada.ca/~media/site/business-and-accountingresources/docs/a-guide-to-financial-statements-of-not-for-profit-organizationsquestions-for-directors-to-ask-2012.pdf>



## **Section 8: Fundraising**

### **Case Statement for Support**

Margaret used to love helping her children do their homework afterschool. She remembers teaching her daughter how to paint and her son how to ride a bike. But now, her children have grown up and moved away. Margaret feels useless. She stays inside most of the day, watching TV. She doesn't have any close friends or family and doesn't get out of the house much. She wonders if anyone really cares about her. At the same time, Michael is somewhere else, sitting at his dining room table and staring hopelessly at his homework. His parents are still at work and he's home alone. He wishes there was someone he could ask for help. But he has no one to turn to. Michael and Margaret both just need a friend. They aren't the only ones. Older adults throughout the community are socially isolated and don't regularly engage in meaningful, purposeful work, yet have so much knowledge and talent to offer to others. There are more children like Michael, who just need someone to talk to and look up to, and who would benefit from learning a new hobby. Older adults and children deserve a new opportunity for friendship. It's time we bridge the gap.

At Bridge the GAP, our mission is to empower youth and elderly adults through mutually beneficial experiences

We strongly believe that the work we do at Bridge the GAP will help to make our community a brighter, happier place to live. The goal of the mentorship program at Bridge the GAP will connect at least 25 older adults and youth in mutually beneficial pairs within the first year and host weekly mentor-mentee meetings. As a result, older adults will increase social interaction, become reengaged in the community, and feel a sense of purpose by providing a positive influence for youth. In return, youth will improve social skills and communication, receive academic mentorship, and have greater regard and respect for older generations. Additionally, Bridge the GAP will host weekly hobby building workshops for youth to learn from older adults. Through these activities, we are showing respect for the life experience and expertise of older adults while giving youth an opportunity to learn from a positive role model. Our programs are inclusive of all types of people from all walks of life. At Bridge the GAP, we believe that everyone has something valuable to share with the community and we want to give them the opportunity.

Through your support of Bridge the GAP, you are showing your respect for the generation that raised us and yo

We appreciate your support. Financial donations provided to Bridge the GAP will help our staff build a strong foundation to support a successful mentorship program for years to come. We also invite you to contribute in-kind support, including toys, books, art supplies, school supplies, backpacks, or facility rentals; all of which will go directly to our academic mentorship programs or our hobby teaching workshops. Finally, volunteers are always welcome to help Bridge the GAP spread the word throughout the community, host mentor-mentee meetings,

recruit mentors and mentees, and more. We look forward to working with you. Let's bridge the gap together.

### **Potential sources of revenue**

Bridge the GAP will work to build a diverse revenue stream that comes from individuals, organizations and corporations, foundations, and grant sources. Due to the likelihood of fluctuating revenue sources, The Board of Directors and the Human Resources/Finance Director will work closely in order to identify areas of untapped funding sources. Additionally, the Core Staff and Board of Directors are expected to contribute an annual financial donation to Bridge the GAP. Support volunteers will be asked to donate, but it is not required. Alachua County is home to University of Florida, a college campus with an extremely large student population. Bridge the GAP will work closely with the university and encourage faculty, staff, and students to make individual donations or host fundraisers on behalf of Bridge the GAP. The Core Staff will all be trained in grant writing and are expected to write grants to secure funding from corporations, foundations, and the state and federal government.

### **Fundraising goals for the first fiscal year**

Fundraising revenues must be able to cover the annual budget for the first fiscal year. Refer to Section 7 in order to review the full budget for Bridge the GAP for the first fiscal year. Components of the annual budget include payroll expenses, start-up costs, materials, and facility rentals. Bridge the GAP plans to accrue revenue primarily from grant funding (60%), individual donations (20%), and corporations and foundations (20%). Surplus revenue from

fundraising will be reported to the Board of the Directors, who will then make a decision on allocation of funds.

### **Methods of fundraising**

The Outreach Director is responsible for creating and implementing the annual fundraising strategic plan for Bridge the GAP. The primary methods of fundraising will include an annual fund drive, special projects, and online fundraising. (Kumaran, 2018)

The annual fund drive will be marketed towards individuals, corporations, and businesses located in the Alachua County community. The fund drive will take place from October-December, as these months are in close proximity to the holidays and we anticipate that the giving spirit of “philanthropy” will be at its peak. Bridge the GAP will send a marketing brochure with a pre-addressed envelope in which individuals can mail their financial donations directly to Bridge the GAP. Additionally, the annual fund drive will also include donation centers set up at schools, senior citizen recreation centers and retirement homes, local places of worship. The donation centers will be comprised of a pile of marketing brochures, a visually appealing display, and a donation collection bucket. Pre-addressed envelopes will also be available so individuals can send donations directly to Bridge the GAP instead of putting donations into the donation bucket. The Outreach Director will work to secure locations throughout the community in which to place the donation centers.

Bridge the GAP will also hold special events throughout the year that are designed to bring the community

In kind donations will be accepted. Examples of in kind donations that are of interest to Bridge the GAP include sports equipment, computers, school supplies, art supplies, and backpacks. Companies like Walmart, Target, Best Buy, Hobby Lobby, and Staples will be

contacted in order to secure in kind donations. In kind donations will also be accepted from individuals. Grant requests will be sent to the Office of Juvenile Justice and Delinquency Prevention, The Global Fund for Children, The Ford Foundation, and private foundations offering grants towards senior citizen engagement and youth mentoring programs.

## **Section 9: Volunteer Management**

## **Need for Volunteers**

The crux of the Bridge the GAP mentor program relies on volunteer engagement. All mentors are participating on a volunteer basis to engage with youth participants in mentee positions. We will need to engage, support, and retain a strong set of older adult volunteers in a formal and managed volunteering setting to ensure continuity of our intergenerational mentorship program. Mentors will be recurring volunteers and provide direct service volunteering because they will be the ones directly in contact with mentees, providing academic and life skill guidance, and working with the Core Staff. The search for valuable and committed mentors is ongoing. The Outreach Director will create and implement an Annual Recruitment plan with recruitment goals that includes strategies, timelines, and budget implications. (Hamilton Fish Institute, 2007) Due to the program model at Bridge the GAP, we anticipate that mentors will also act as clients and receive benefit from the services provided by Bridge the GAP. We will need to engage at least 10 separate volunteers, called Support Volunteers, who are not acting as mentors in order to provide support to Core Staff and mentor activities. These volunteers will mostly provide indirect support with some direct service volunteering opportunities, preferably in a recurring and managed format. The Support Volunteers will provide invaluable services to Bridge the GAP by assisting the Core Staff, Facilities Managers, and Mentor Coaches in implementing program plans, organizing events, gathering and setting up materials, and being present at mentor/mentee meetings. Unpaid volunteer work is estimated to be worth approximately \$22.14 per hour per employee. (Kumaran, 2018) Additionally, volunteers bring compassion, enthusiasm, and dedication to the organization, which will continue to motivate Core Staff and participants and move Bridge the

GAP forward from the bottom up. Therefore, volunteers for Bridge the GAP will not only represent a financial benefit, but they also represent community buy-in to support the Bridge the GAP mission.

### **Recruitment**

The Outreach Director will work together with the Human Resources/Finance Manager and the Mentor Coaches to develop marketing material directed towards prospective volunteers, contact community organizations to advertise volunteering opportunities, and attend local volunteer fairs. The University of Florida and Santa Fe Community College are both located in Alachua County, Florida and represent a student population that could potentially be a source of volunteers for Bridge the GAP. There is a biannual student involvement and volunteering fair on both of these campuses and Bridge the GAP will be present to advertise open volunteering positions. Further advertisement for volunteering opportunities will be posted on the Bridge the GAP website, and at local schools, libraries, and places of worship. Additionally, there are several locations throughout the community where it will be important to engage older adults to become mentors in Bridge the GAP programs. The Outreach Director and Mentor Coaches will be responsible for traveling to places like ElderCare of Alachua County, Oak Hammock Retirement Community, Atrium at Gainesville Retirement Community, local places of worship, and community organization meetings like Lions Club International and Rotary Club of Gainesville. It is important to meet these older adults where they are and explain the mission, vision, and program goals of Bridge the GAP. Through this direct recruitment strategy, we hope to engage and excite older adults in the community to volunteer their time to be mentors.

## **Job Descriptions**

*Older Adult Mentors (Volunteers):* Reports to the Mentor Coaches and Education Director. Responsibilities of the older adult mentors are to attend mentor training sessions, mentor/mentee programs, provide academic guidance to mentees, teach a hobby or skill, and provide feedback about progress of mentor/mentee relationships. The mentor is committed to meeting with mentees at least 1 hour per week, maintaining confidentiality, and leading and conducting mentor/mentee meetings in a professional yet comfortable manner. All new mentors must complete orientation and training under the supervision of the Volunteer Coordinator, Education Director and Mentor Coaches in addition to quarterly continuing education training sessions.

*Support Volunteers:* Reports to Volunteer Coordinator and works on projects to support the initiatives of any member of the staff. Responsibilities vary upon organizational need; however, some duties may include: attending mentor/mentee events and setting up facilities, monitoring mentor and mentee check-in to meetings, organizing materials and supplies, posting marketing material, and assisting with mentor and mentee recruitment. Support volunteers should be flexible, committed, professional, and believe in the Bridge the GAP mission. All new support volunteers must complete orientation and training under the supervision of the Volunteer Coordinator.

## **Requirements**



Bridge the GAP programs involve children under the age of 18, resulting in elevated requirements for our volunteers, both for mentors and support volunteers. Requirements for mentors: must be over the age of 55, agree to a one-year commitment to serve as a mentor, commit a minimum of 1 hour per week with the mentee, be willing to communicate regularly with the mentee and/or the mentees family when appropriate, complete screening procedures, have access to reliable transportation, does not poses a criminal history or been convicted of a felony, never been a user of illicit drugs, does not use alcohol in excess or while providing direct mentoring, not be in treatment for substance abuse, reports any treatment for substance abuse within the past 5 years, not under treatment for mental disorder, provide honest and truthful background information, and must never have been arrested, charged, or convicted of child abuse or molestation. (Hamilton Fish Institute, 2007) Support volunteers must be at least 18 years or older, agree to either short-term or long-term volunteering, complete a background screening, and commit to communicating regularly with the Volunteer Coordinator. Every volunteer will be subject to a drug screen, fingerprinting and Florida Department of Children and Families background screening.

### **Application**

Applications to become a mentor will be provided at community outreach and recruiting events. Older adults who are interested in mentoring may also access an application online. Applications to be a support volunteer will be provided to University of Florida and Santa Fe Community College offices of student involvement, provided at recruiting fairs, and posted online. Once the Human Resources/Finance Director reviews mentor and support volunteer

applications, he or she will contact the prospective volunteer about the next steps in screening, orientation, and training.

### **Screening Tools**

The screening policy at Bridge the GAP is a part of the risk management plan and is in place to ensure that the volunteers we select are willing and able to help us succeed. (Hamilton Fish Institute, 2007) The first step in the screening process is a phone call from the Human Resources/Finance Director. The prospective mentor volunteer will be asked basic questions and should be able to confirm information from their application. The Human Resource/Finance Manager will also verify their driving record, criminal history (including history of child abuse), contact personal references, and verify drug and alcohol screening results. The final step in the screening process is an in-person interview to be conducted by the Human Resources/Finance Director, Volunteer Coordinator, and at least one other member of the Core Staff (Outreach Director, Education Director, or Executive Director). All mentor volunteers are expected to complete this process. Support volunteers will complete the same process but will attend an in-person, group interview with the Human Resources/Finance Director and Volunteer Coordinator. Under rare, extenuating circumstances when the mentor or volunteers do not meet the eligibility criteria, the Board of Directors and Executive Director have the power to provide written approval. All records of the screening process will be maintained by the Human Resources/Finance Director.

## **Orientation and Training**

Bridge the GAP will make it a priority to help mentors and support volunteers assimilate into the organizational culture and recognize their value as a part of the team. Orientation and training sessions for new mentors and new support volunteers will be an important time to establish this sentiment. Additionally, this training policy will ensure that all new mentors and support volunteers receive the same standardized introduction to organizational policies and procedures, which will contribute to quality control and risk management.

### **Alignment to mission and organizational culture**

It is expected that all volunteers, including mentors and support volunteers, understand the Bridge the GAP mission, vision, and core values. We believe that it is important for every member serving our organization on a paid or volunteer basis to fundamentally understand and “buy-in” to the organization’s cause. When we all function on the same common values, it is easier to communicate and work together to achieve our mission and vision. In addition to the new mentor and new volunteer training, we will hold monthly volunteer socials. This will be a time for volunteers to meet and socialize with each other and the Core Staff. It is our goal that all volunteers and paid employees will feel comfortable and communicate with each other, thus improving efficiency and effectiveness of our organization. Volunteers are encouraged to speak with the volunteer coordinator or the Human Resources/Finance Director if they have any concerns about their work or ideas to improve the Bridge the GAP programs.

## **Clarification of expectations for volunteers and organization**

All new volunteer mentors and support volunteers will learn about the program goals, the program methods, and the projected outcomes planned for Bridge the GAP during the orientation and training session. During this training session, we want to be transparent and communicate expectations clearly. Volunteers must know and understand the expectations for their position on the Bridge the GAP team in order to assimilate smoothly and be contributing members of our team. The Human Resources Director, Mentor Coaches, and Education Directors will primarily be in charge of leading these orientation sessions and will disseminate important information about job roles and expectations.

## **Orientation and training procedures**

There will be separate group training and orientation sessions for volunteer mentors and support volunteers. In general, orientation and training will be held each month, or more frequently to accommodate groups of new volunteers greater than 10. The Human Resources/Finance Director and the Volunteer Coordinator will work together to host the support volunteer orientation. The support volunteer orientation will be approximately 2 hours long and will be general, with focus on review of all pertinent HR and personnel policies. The Human Resources/Finance Director and the Mentor Coaches will work together to lead the new mentor training. During the new mentor training, the new mentors will fill out a Mentor Interest Survey, which will inform the Mentor Coach and Education Director in making mentor-mentee pairs and help guide regularly planned hobby and skill workshops. Additionally, mentors will receive basic training about how to best serve as a mentor and how to complete academic mentoring. This training is based on the handbook titled “The Wisdom of Age: A

Handbook for Mentors” (Taylor, 2015) and the “kidREACH” after-school academic tutoring curriculum (World Vision, 2015). At least one current mentor who is already serving in Bridge the GAP programs will be asked to attend a training session to share their experience and advice for new mentors. The Human Resource/Finance Director will review all pertinent HR policies, sexual abuse prevention training, and personnel policies with new mentors. Overall, the initial training sessions will be approximately two hours and will be mandatory for all mentors to attend. Continuing education training sessions will be offered to mentors on a quarterly basis and will be optional but highly encouraged. It is important to Bridge the GAP to continuously evaluate recruiting strategies. Therefore, at each orientation and training session, the Human Resources/Finance Director will collect information about how volunteers learned about Bridge the GAP. This information will be compiled and given to the Outreach Director to inform recruitment strategies. Additionally, training session participants will be asked to complete a brief evaluation survey about the adequacy and appropriateness of the format of training sessions in order to improve on future sessions.

### **Evaluation of Volunteers**

All volunteers will be asked to keep a log of volunteer activities, time spent volunteering, and briefly reflect on the types of activities performed. For record keeping purposes, the Volunteer Coordinator will collect individual volunteer records from support volunteers and generate a quarterly Volunteer Report. All mentors will be asked to keep a log of mentor-mentee meetings, topics discussed during meetings, and briefly reflect on the conversation and interactions with their mentee. The Mentor Coaches will collect individual mentor records and generate a quarterly Mentor Report. Additionally, the Mentor Coaches will review the mentor

reflections each week and provide guidance and feedback when necessary. The Mentor Coach may also refer the mentor or mentee to the Human Resources/Finance Director regarding personnel issues or need for a social worker consultation. The Mentor Coach is expected to regularly engage in conversation with mentors and verbally discuss how mentor-mentee meetings are going and will provide guidance during those conversations.

### **Recognition of Volunteers**

Bridge the GAP recognizes the valuable role of volunteers in our organizational mission. Therefore, there will be volunteer recognition initiatives in order to show our appreciation for the mentors and support volunteers that show positive contributions and commitment to Bridge the GAP. During the quarterly volunteer and mentor socials, Bridge the GAP Core Staff will host a 15-minute volunteer recognition ceremony. The Volunteer Coordinator will spearhead this effort and present organizational highlights, key accomplishments by volunteers, and spotlight outstanding mentors and volunteers. The Volunteer Coordinator will also be responsible for sending out cards to volunteers on holidays and birthdays with signatures from Bridge the GAP staff members. At the end of the year, there will be a Bridge the GAP banquet for mentors, mentees, and volunteers to attend. Throughout the year, the Volunteer Coordinator will collect nominations for “Mentor of the Year” and “Volunteer of the Year”. The winners of these awards will be presented and recognized at the end-of-the-year banquet.

## References for Section 9: Volunteer Management

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The Wisdom of Age: A Handbook for Mentors., Taylor, (2015.). Retrieved from

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<https://ufl.instructure.com/courses/357626/pages/week-9-volunteer-management>

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<https://ufl.instructure.com/courses/357626/pages/week-8-fund-raising>

## **Section 10: Marketing and Community Relations**

### **Marketing Plan**

Bridge the GAP will engage in a strategic and sustainable marketing plan that is designed to promote the organizational mission, vision, values, and success stories. Bridge the GAP will engage with and build relationships with individuals and institutions to establish mutual value and exchange for the betterment of the community. (Renz, 2016) The goal of the Bridge the GAP marketing plan is to not only promote the organization a garner the support of the community, but to also create a culture of customers for the organizations rather than a one-time transitional relationship. (Kumaran, 2018) The marketing plan will include a strategic approach in which we will first identify our target market, define the needs of the market, determine the appropriate position and identity of Bridge the GAP within the community hierarchy. We will then use that information to establish or redefining our products and services, identify the price for services, develop a targeted promotion plan, and evaluate optimal locations for provision of Bridge the GAP products and services. (Renz, 2016) It will be important to continuously include Board members, employees, volunteers, and current customers to assess the status of Bridge the GAP within the Alachua County community and make recommendations to encourage more effective and efficient marketing. We understand and value a marketing plan that is structured to uphold the mission of the organization and promote our cause yet fluid enough to appeal to a changing marketplace, wide ranges of audience values, and promote mutual benefits.



## **Segmentation and Target Audience**

Bridge the GAP has a vision to create a society that prioritizes meaningful intergenerational partnerships so that everyone feels they have a place and purpose in life. In order to establish a clientele that would most benefit from our mission, capabilities, and aspirations, market segmentation is essential. (Renz, 2016) Marketing segmentation will allow for Bridge the GAP to allocate a finite budget for marketing to the audience that is best fit to our mission. (Renz, 2016) Segmentation will be performed within definitions of geographic, demographic, and socioeconomic characteristics. Geographic segmentation will be used to identify potential customers and clients who live in Alachua County. Demographic segmentation will identify individuals by gender, ethnicity, and age. Socioeconomic segmentation will identify individual's education level, profession or occupation, and income.

Bridge the GAP provides programs and services for older adults and children living in Alachua County. The clientele target audience is comprised of residents of Alachua County who are members of two demographic groups: children, ages 12-18 years old, and older adults, age 55 or older. Donors and supporters will include private residents, local businesses, foundations, and religious or educational organizations located in Alachua County who share similar values of community building and lifelong learning. Other supporters include schools and senior care facilities to make referrals to our organization. The donor and supporter target audience will be identified through socioeconomic segmentation as having the financial means and freedom to make a fiduciary commitment or resource allotment to Bridge the GAP. Another crucial segment of our marketing audience includes candidates for volunteers and employees. The volunteer target audience will be broad but includes men and women, age 18 and older, with

demonstrated history or experience in volunteering in Alachua County or similar community.

The staff target audience will include men and women, age 18 and older, with a college degree, professional skills and exhibits personality variables including empathy, organization, and passion for the cause.

### **Marketing Goals and Objectives**

As previously stated, Bridge the GAP will strive to engage in a marketing strategy that is consistent with the organizational mission and values. In order to ensure we provide the most appropriate and on-brand message to all of our target audiences; specific marketing goals have been established for these four groups.

The goal for clients is to engage older adults and children in the Alachua County area to increase participation in mentoring and skill building programs. The specific objectives within the first year are to:

- Develop and employ an awareness campaign about the identity and mission of Bridge the GAP programs.
- Engage at least 25 older adult mentors and at least 25 children mentees.

The goal for donors and supporters is to raise awareness, secure long-term funding, and establish the value placed on community support, continuing education, longevity, and youth development added to the community through Bridge the GAP programs. The specific objectives within the first year are to:

- Develop and employ an awareness campaign about the identity and mission of Bridge the GAP programs.
- Raise \$300,000 in operating funds from donors and supporters.

- Build and maintain professional relationships with donors and supporters in the community to establish sustainable support through resource donations (monetary and in-kind), referrals, and facility rentals.

The goal for volunteers is to raise awareness about the mission and programs at Bridge the GAP and the value and need for volunteer support. The specific objectives within the first year are to:

- Develop and employ an awareness campaign about the identity and mission of Bridge the GAP programs.
- Build and maintain professional relationships with individuals, local organizations, University of Florida, and Santa Fe Community College as a source of qualified volunteers.

The goal for employees is to locate professional and qualified candidates who display integrity, passion, and commitment to work for Bridge the GAP. The specific objective within the first year is to:

- Hire and train 10 full time employees with an 80% retention rate.

## **Branding**

At its core Bridge the GAP is an intergenerational mentoring program. This organization aims to bridge the divide between the oldest and youngest segments of our society by bringing them together through counseling, collaboration, and education. That is why our namesake is so dear to us. "GAP" stands for Generational Alliance Program. We have a vision to create an alliance between all members of our community for the mutual benefit of society. We seek to promote a culture of inclusivity, friendship, support, and confident building. We will portray our genuine

desire to welcome all individuals of the Alachua County community into our organization through our branding strategy. Furthermore, we seek to use our branding strategy to build associations between our logo and marketing messaging to our mission, values, programs, services, and personnel.

The Bridge the GAP branding portfolio includes the organizations mission statement, logo, color schemes, tagline and a collection of the approved letterhead, signature tagline, and printed marketing materials. The color scheme is orange and yellow which were chosen to because they are warm, bright colors that portray positivity and inclusivity.

*The mission of Bridge the GAP:*

The mission of Bridge the GAP is to empower youth and elderly adults through mutually beneficial experiences focused on practical skill building, academic improvement, and socialization. Bridge the GAP believes that individuals of all ages are valuable members of society.

*The Bridge the GAP logo:*



*The Bridge the GAP tagline:*

**A Generational Alliance Program for a Better Today**

## **Evaluation**

At Bridge the GAP, we recognize that our marketing plan must be able to adapt to changing client needs and a fluctuating marketplace. Therefore, we plan to evaluate our marketing plan on a quarterly basis and our branding portfolio on an annual basis. Materials will be updated in response to current and prospective client needs and interests. Additionally, we will issue a survey to donors, volunteers, and participants to assess the medium in which they heard about the organization, their ideas and expectations about the organization, and the effectiveness of our marketing plan in communicating our programs and mission to the public. This survey will also be available on our website. The information collected from these surveys will be synthesized and provided to the Outreach Director and the Board of Directors to be used when reformulating the marketing plan.

## **Community Relations**

The success of the mission and vision of Bridge the GAP is rooted in its ability to effectively communicate and mobilize the community. Positive community relationships will allow Bridge the GAP to maintain support and increase awareness of programs and services. (Kumaran, 2018) Overall, the community relations activities of Bridge the GAP are reserved for opportunities to promote the mission, vision, and core values of the organization and will be handled by a designated spokesperson, the Outreach Director. It falls under the purview of the Outreach Director to develop a tailored, proactive, and deliberate plan to build a relationship with community stakeholders and media organizations. This plan will be written and provided to all employees and the Board of Directors to follow in addition to evaluating the plan and making changes as appropriate. The Outreach Director will consider the content, noise,

network and direction of communication in formulating a community relations plan. (Kumaran, 2018)

### **Key Messages**

As mentioned in the above section, Bridge the GAP will carefully develop messaging that is consistent, appropriate, and concise. The goal is to clearly communicate our program mission and values to all types of people in our target audience. Considerations will be made to include language that appeals to clients, donors, supporters, volunteers, staff, and the Board of Directors in addition to media, press, and community stakeholders. The orientation of all new volunteers and staff will include a debriefing of key messages in order to ensure that Bridge the GAP presents a united front in delivering key messages.

The key messaging includes:

- Bridge the GAP is an intergenerational mentoring program that seeks to connect individuals through mutually beneficial partnerships.
- Bridge the GAP believes it is never too late to discover a new passion or to make a new friend.
- Bridge the GAP strives to promote respect and inclusivity of all members of the community.
- Bridge the GAP celebrates our individually unique talents, personalities, and attributes.
- Bridge the GAP encourages everyone to pursue growth and learning at all stages in life.
- Connections are important. We want to bring talented individuals together for the improvement of our community.

### **Delivery Methods**

Bridge the GAP will use a multi-faceted approach in delivering our key messages to the community. The front-line approach will be a social media and website campaign targeted to reach youth in the Alachua County community. As more individuals engage in social media use at an earlier age, we see an opportunity to reach a target audience for clients. Additionally, we seek to communicate our message to our target audience for clients of older adults. We will accomplish this by purchasing advertisements in the local newspaper, community newsletters and radio, sending out promotional postcards, and visiting community gatherings to deliver our messages in person. Messaging to donors and supporters will be managed through social media, internet campaigns, print resources, radio and television, and in-person meetings. Bridge the GAP will send out bi-annual reports of activities, success stories, and requests to previous and prospective donors, supporters, clients, and stakeholders.

### **Working with the Media**

The Outreach Director will work to formulate a media toolkit for all employees and volunteers to access. It is our organization's policy that employees, preferably the Executive Director or Outreach Director, are the spokespeople in working with the media. Interviews and formal statements will be issued by the Executive Director or the Outreach Director. If media inquiries seek for other staff, volunteers, or clients to be interviewed, they must be approved by the Executive Director, Outreach Director, or Board of Directors. All staff and volunteers will receive basic training on communicating with the media and appropriate procedures to follow. Clients under the age of 18 will need written permission from a parent or legal guardian before participating in media inquiries.

## References for Section 10: Marketing and Community Relations

Renz, D. O., & Herman, R. D. (2016). *The Jossey-Bass handbook of nonprofit leadership and management*. Hoboken, NJ: Jossey-Bass, A Wiley brand.

Kumaran, M. (2018) Module 10: *Marketing and Community Relations* [PDF]. Retrieved from <https://ufl.instructure.com/courses/357626/pages/week-10-marketing-and-community-relations>



## **Section 11 Ethics, Transparency, and Accountability**

A code of ethics and transparency measures allow for honest brokering of public service. In order to stay on the appropriate path toward achieving the Bridge the GAP mission, we will follow accountability measures across all aspects of our practice. This includes fiscal responsibility policies, ethical fundraising procedures, internal control and auditing, use of disclosure statements, transparency during public discourse, honest reporting of outcomes and evaluation standards, and organized record keeping. (Kumaran, 2018) All Board of Directors members, staff, and volunteers will be trained in ethical practice and transparency measures during their respective orientation sessions.

### **Code of Ethics and Adherence**

The core values of Bridge the GAP are respect, pursuit of growth, inclusivity, honesty, discovery, and celebration of diversity. In addition to these organizational values, Bridge the GAP also hold ethical values that include integrity, respect, openness, fairness, honesty, commitment beyond the law, transparency and responsibility. We seek to embed these values into the culture of our organization and rely on them to guide decision making and program planning. Our code of ethics and values will be reviewed at least quarterly with every member of the Bridge the GAP organization. Upon reviewing the code of ethics, all employees, Board members, and volunteers will be asked to sign a pledge of ethics that states as follows: *As a representative of Bridge the GAP, I pledge to conduct all activities ethically in support of the mission, vision and values of the organization. I will comply with all organizational policies and bylaws in addition to local, state, and federal laws that apply to the organization. In such a case that I am found to*

*have acted incongruently with the Bridge the GAP Code of Ethics, I understand that my actions may be subject to legal judgement and my affiliation with Bridge the GAP will be terminated.*

### **Transparency Measures**

Transparency measures are put into place in order to secure internal trust in addition to the public trust. Bridge the GAP will operate with transparency in order to establish credibility and justify adherence to regulations and laws. (Kumaran, 2018) Organizational proceedings, activities, and Board meeting minutes will be accessible to the public. The following lists the transparency measures adopted by Bridge the GAP:

- Provide information posted to our website, [www.BridgetheGAPAlachua.org](http://www.BridgetheGAPAlachua.org)
  - IRS Form 990 for each year of operation
  - Annual reports about programs and services
  - Information about staff and Board members
  - Professional contact information for staff members
- Upon request, Bridge the GAP is amenable to providing
  - Annual budgets
  - Financial statements and fiscal policies
  - Board meeting minutes
  - Articles of Incorporation, bylaws, and personnel policies
- Bridge the GAP strives to
  - Disclose partners on appropriate documents, website and advertising material
  - Actively share organization activities on social media
  - Provide financial statement and resource allotment reports to donors

## **Accountability Measures**

Bridge the GAP values ethics and transparency in all organizational endeavors. Therefore, it is critical for all members of the Board, employees, and volunteers be held to a high ethical standard. Prior to assuming responsibility of their roles within the organization, all personnel will be informed of the Code of Ethics and expectations to act in accordance with transparency measures. The Human Resources/Finance Director serves as the primary resource for personnel to discuss concerns or ask questions about daily operations that might conflict with the Code of Ethics. The Board of Directors can provide guidance on ethical proceedings as well. The following include specific measures for promoting accountability:

- Written and signed letters stating conflicts of interest
- Signed Code of Ethics agreements
- Development of an approval system by the Board of Directors for access of funds by the Executive Director or other personnel.
- Conduct annual audits and review financial policies.
- Frequently update organizational information for stakeholders and profile on GuideStar.
- Evaluate programs and daily operations while continuously monitoring performance.

## **References for Section 11: Ethics, Transparency, and Accountability**

Kumaran, M. (2018) Module 11: *Legal and Ethical Aspects of Nonprofit Management* [PDF].

Retrieved from <https://ufl.instructure.com/courses/357626/pages/week-11-legal-and-ethical-aspects-of-nonprofit-management>

Independent Sector (2004) Statement of Values and Code of Ethics for Nonprofit and

Philanthropic Organizations. Retrieved from

<http://www.ncdsv.org/images/stmtofvaludescodeethics.pdf>

## Section 12: Risk Management

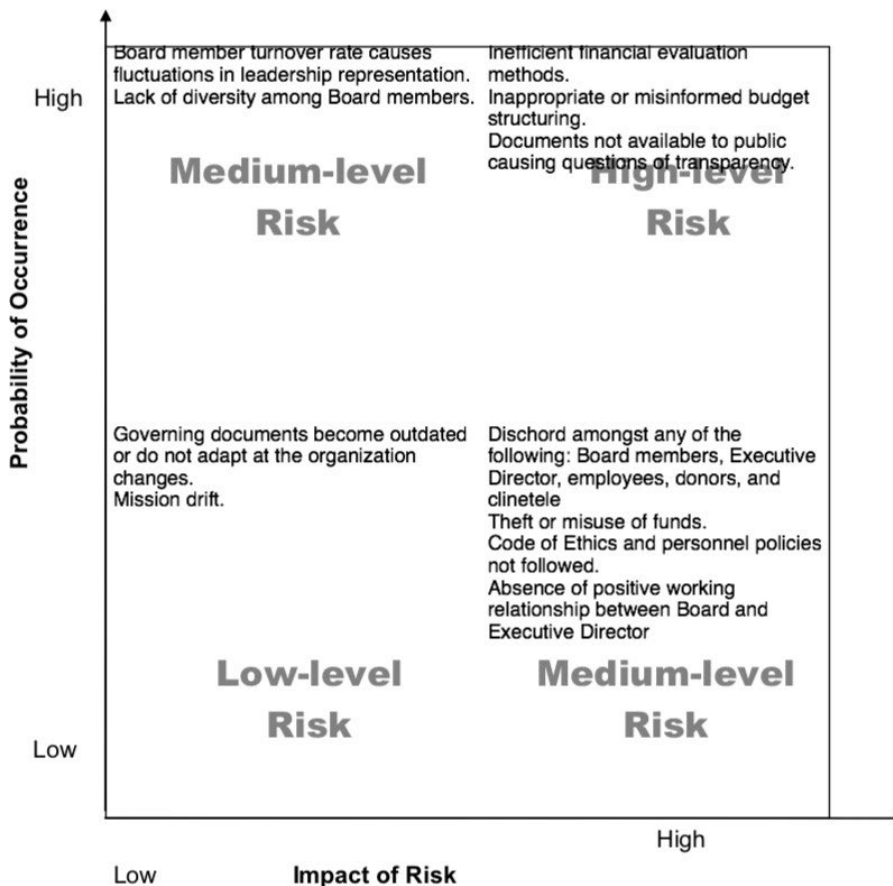
### Identification of Major Risk Areas

#### Governance-related risks:



#### Risk Impact/Probability Chart Worksheet

- For instructions on using the Risk Impact/Probability Chart, visit [www.mindtools.com/rs/risk](http://www.mindtools.com/rs/risk).
- For risk analysis, visit [www.mindtools.com/rs/riskanalysis](http://www.mindtools.com/rs/riskanalysis).



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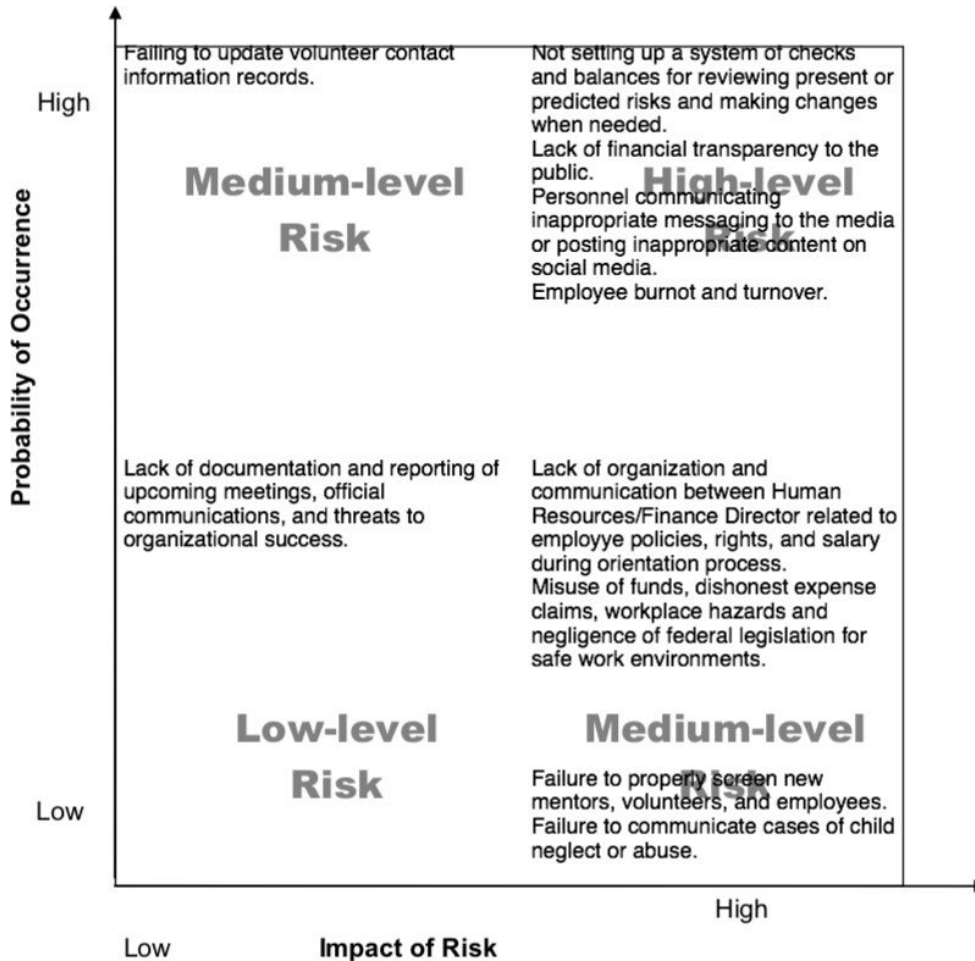
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Administrative-related risks:



### Risk Impact/Probability Chart Worksheet

- For instructions on using the Risk Impact/Probability Chart, visit [www.mindtools.com/rs/risk](http://www.mindtools.com/rs/risk).
- For risk analysis, visit [www.mindtools.com/rs/riskanalysis](http://www.mindtools.com/rs/riskanalysis).



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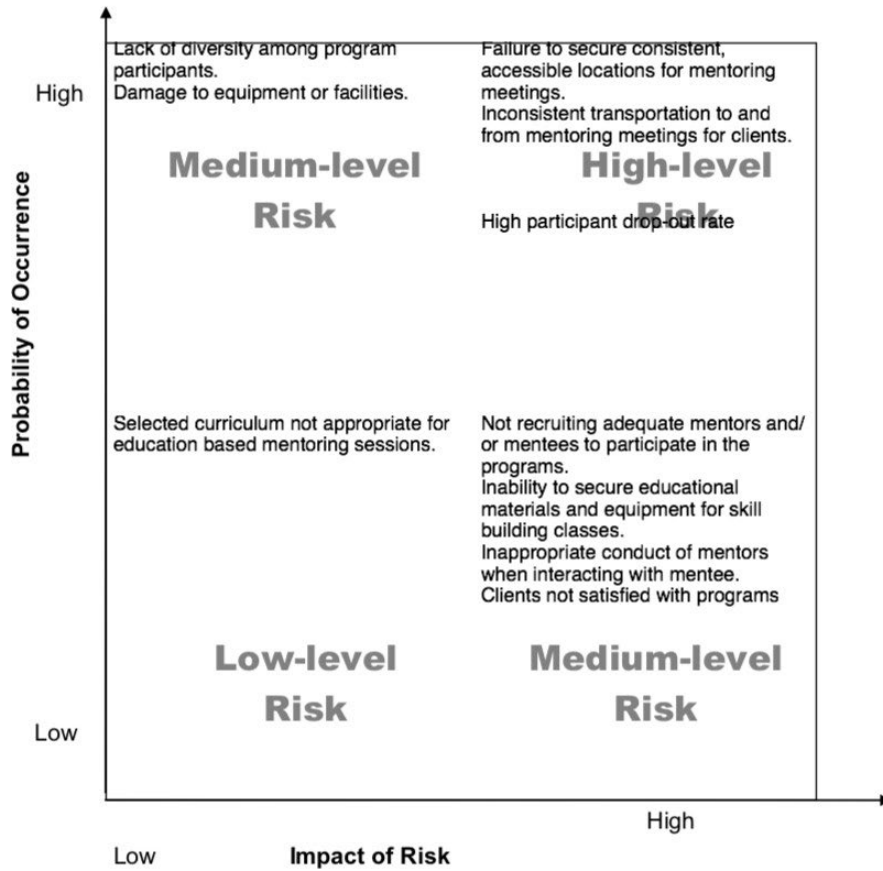
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Operations-related risks:



Risk Impact/Probability Chart Worksheet

- For instructions on using the Risk Impact/Probability Chart, visit [www.mindtools.com/rs/risk](http://www.mindtools.com/rs/risk).
- For risk analysis, visit [www.mindtools.com/rs/riskanalysis](http://www.mindtools.com/rs/riskanalysis).



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## **Risk Treatment and Mitigation Strategies**

### **Governance-related risks**

- Develop a conflict resolution strategy for disputes between Board members or Board members and personnel.
- Provide written expectations for Board members at the start of each leadership term.
- Establish and communicate expectations for Board member attendance to quarterly meetings.
- Organize and lead an annual Board member retreat.
- Establish rule or expectation that all Board members must be active on a committee of the Board
- Evaluate the organizations financial activity and provide checks and balances on funding and expense reports.
- Continually review the organization bylaws and make changes as appropriate.
- Enlist a risk financing strategy and maintain a current Directors and Officers Insurance policy.
- Review threats and liabilities to the organization.
- Establish a course of action for disclosure of and dealing with conflicts of interest.



## **Administrative-related risks**

- Establish a proactive social media use policy that protects the organization from reputation damage.
- Review personnel policies with employees on a quarterly basis.
- Audit personnel policies on an annual basis.
- Develop a tracking method for keeping all volunteer, employee, and mentor background checks up to date.
- Develop a system that tracks financial expenditures and reimbursement activities. These reports should be reviewed by the Board on a quarterly basis.
- Create a standard policy for reporting suspected child neglect or abuse to local, state or federal authorities.
- Create an investment strategy to ensure financial stability and sustainability.
- Review investment strategy at the annual Board member retreat.
- Audit organizational programs and activities to ensure all aspects are in accordance to the mission and the vision.
- Hire a CPA to audit the financial records.
- Purchase and maintain umbrella insurance.
- Establish a privacy policy to protect the identity of mentees who are minors.

## **Operations-related risks**

- Regularly administer and update client surveys to evaluate satisfaction with programs.
- Establish emergency preparedness plans and alternate facilities to host programs.
- Timely and swift investigation of complaints of inappropriate conduct of a mentor or mentee.
- Audit program policies, procedures, and plans to inform all staff and volunteers of expectations.
- Review mentoring curriculum and update as necessary.
- Review academic counseling curriculum and update as necessary.
- Train all volunteers and employees in Red Cross first-aid.
- Keep a first aid kit on site during programs.
- Develop and update a social media campaign to promote interest in programs.

## References for Section 12: Risk Management

- Kumaran, M. (2018) Module 12: *Risk Management* [PDF]. Retrieved from <https://ufl.instructure.com/courses/357626/pages/week-12-risk-management>
- MindTools. (2016). Risk impact/probability chart worksheet. Retrieved from [https://www.mindtools.com/pages/article/newPPM\\_78.htm?download=1](https://www.mindtools.com/pages/article/newPPM_78.htm?download=1)