

# A. Executive Summary

Completed by [ringles@seniorsinservice.org](mailto:ringles@seniorsinservice.org) on 2/13/2024 11:12 AM

**Case Id:** 25294

**Name:** Seniors in Service of Tampa Bay, Inc. - 2024/25

**Address:** 1306 W. Sligh Ave, Tampa, FL 33604

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## A. Executive Summary

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PLEASE READ: Before proceeding with the application, please [CLICK HERE](#) to review the Notice of Funding Availability and additional application information.

Once you have reviewed this document, please continue with the application below.

### AGENCY INFORMATION

#### A.1. Agency Name

Seniors in Service of Tampa Bay, Inc.

#### A.2. Type of Organization

501(c)3 Nonprofit Corporation

**If Other:**

#### A.3. Mailing Address

1306 W. Sligh Ave Tampa, FL 33604

#### A.4. Contact Person

Robin Ingles

#### A.5. Title

CEO

#### A.6. Telephone

(813) 368-6746

**Phone Ext.**

#### A.7. Email

[ringles@seniorsinservice.org](mailto:ringles@seniorsinservice.org)

#### A.8. Unique Entity ID #

59-2422975

### BILLING/INVOICE CONTACT

#### A.9. Name

Heather Rogers

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### PROJECT INFORMATION

#### A.15. Project Title

Senior Companion Services

#### A.16. City of Largo Funds Requested

\$12,760.00

Public Services (Supportive Services) \* must have a minimum of \$10,000 in funding request.  
Public Facility Capital Projects-\* must have a minimum of \$40,000 in funding request.

#### A.17. Type of Project:

- Homeless Shelter Services
- Non-Homeless Special Needs Services
- Rental Eviction Prevention Services
- Public Facility Capital Project-Improvements
- Public Facility Capital Project-Facility Expansion
- Public Facility Capital Project-Add New Facility
- Other

**If Other**

**A.10. Email**

hrogers@seniorsinservice.org

**A.11. Phone**

(813) 492-8934

**A.12. DATA/REPORTING CONTACT**

**A.12. Name**

Lorena Mielke

**A.13. Email**

lmielke@seniorsinservice.org

**A.14. Phone**

(813) 492-8925

## B. Project Information

Completed by [ringles@seniorsinservice.org](mailto:ringles@seniorsinservice.org) on 2/13/2024 11:22 AM

**Case Id:** 25294

**Name:** Seniors in Service of Tampa Bay, Inc. - 2024/25

**Address:** 1306 W. Sligh Ave, Tampa, FL 33604

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## B. Project Information

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Please provide the following information.

**B.1. Project Purpose and Description-** Describe the project and explain why the project is needed. This description should include the entire project, in addition to portions of the project not requested for funding from the City.

**Provide data in support of the request. Examples: Energy improvements will reduce utility costs by X% annually, which allows an estimated \$\_\_\_\_\_ in operating funds for direct client services; or data shows a waiting list of # of people/deficiency in available space of # capacity to serve Largo residents**

PROJECT DESCRIPTION: Seniors face an epidemic of loneliness that is more hazardous to their health than smoking 15 cigarettes a day. We provide regularly scheduled Small Group Companionship activities in senior living communities to provide social connection for seniors & improve their ability to age in place. Our project directly aligns with City of Largo's 2020-2024 Consolidated Plan Priority of Supportive Services to help the special needs population of isolated seniors physically, mentally & economically thrive. Largo CDBG funding will expand our existing Small Group Companionship services to low-to-moderate income elders, aged 62+ in senior living communities in Largo. Small Group Companionship has been established in Pinellas since 2022 through Pinellas CDBG & AmeriCorps Seniors funding.

We will provide regularly scheduled Small Group Companionship activities for 75 low-to-moderate income isolated elders to create a sustainable living environment by reducing social isolation & improving access to critical services. Activities are strategically designed to encourage conversation, deeper social connection, increase physical activity, & improve knowledge of social services. Activities like "Companionship Bingo" provide a fun opportunity for residents to share life experiences, favorite memories, & hobbies to build a foundation of friendship. Volunteer Projects such as packing "Cold Weather Kits" for homeless individuals encourages physical activity & improves mental health through service to others. Group Trivia encourages camaraderie, conversation topics & mental stimulation.

Best practices ensure we're reaching the most isolated seniors with meaningful, long-term support:  
Reduce Barriers: We meet seniors where they are. Small Group Companionship activities take place within the community where seniors live, making them accessible to the most isolated seniors who lack mobility or transportation.

Sustainable Solution: Ongoing companionship activities help seniors get to know their neighbors, develop a sense of community where they live, & build a foundation for long-term friendship. As a result, seniors reduce the devastating health effects of loneliness & develop a network of support within their community to improve their ability to age in place.

Increased Access to Critical Services: Small Group Companionship provides a safe place for elders who lack support from family & friends to open up about challenges they may be facing such as Food Insecurity, Financial Fraud, or

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Unsafe Living Conditions. We connect elders to additional services through established partnerships with over 150+ organizations including Area Agency on Aging Pasco Pinellas, Suncoast Credit Union, Neighborly, & Disability Achievement Center. Additionally, isolated elders in need of more intensive companionship services are referred to our 1-on-1 companionship services based on need, including: TelePals (regularly scheduled friendly calls); Health Buddies (seniors with chronic conditions receive ongoing encouragement & health coaching to reduce preventable hospital visits); Senior Companions (one-on-one in-person visits to help elders age in place).

ANTICIPATED OUTCOMES: At least 80% (60/75) of participants will report improved social support, improved access to critical services, &/or improved capacity for independent living. Outcomes will be evaluated using surveys collected by staff or partner sites at least annually from individuals who receive companionship via small support groups. We will use the AmeriCorps Seniors Independent Living Survey that we've used for decades in our Senior Companion Program to gauge program success in meeting the outcome.

PROJECT NEED: Loneliness has health consequences that are devastating, especially for seniors. Despite high rates of older adults feeling isolated & lonely, many are unwilling to self-identify as needing help. BayCare's Community Health Needs Assessment reports increasing percentage of depression in the Medicare population ranks Pinellas County among the worst 25% of counties in the state/nation. According to the US Surgeon General's 2023 Health Advisory, poor social connection is associated with increased risk of disease, including a 29% increased risk of heart disease & a 32% increased risk of stroke. It's associated with increased anxiety, depression, & dementia & may increase susceptibility to viruses & respiratory illness. The Advisory also indicates older adults have the highest rates of social isolation. Conversely, people who engage in meaningful, productive activities with others tend to live longer, boost their mood, & have a sense of purpose. [NIA, April 2019]. There is an urgent need for funding to provide companionship for Largo's isolated elders. Small Group Companionship will help 75 low-to-moderate income elders age in place. A huge benefit considering Genworth's 2021 data showing \$49,740/year for assisted living; \$127,385/year for private nursing homes.

**B.2. Describe the use that will be made of requested funds from the City of Largo. If the funding is being requested for specific staffing positions or specific components of a larger project, please provide these details and explain how this funding request ties in with the entire project.**

We are requesting \$12,760 to cover 20% of the salary and benefits for one Program Coordinator to implement Small Group Companionship activities to improve social support, access to critical services, & capacity for independent living for seniors throughout Pinellas County. 20% of the Program Coordinator's time is designated to serving seniors in Largo City limits.

Funding Request includes:

- 20% of Program Coordinator Salary: \$48,000 ( $\$48,000 \times .20$ ) = Total Salary Requested \$9,600
  - 20% of Employee Benefits:
    - FICA (7.65% of \$48,000)  $\$3,672 \times .20 = \$734$
    - Health Insurance (Health \$722/month + Dental \$44/month)  $\times 12 \text{ months} = \$9,192 \times .20 = \$1,838$
    - Retirement (3% of \$48,000)  $= \$1,440 \times .20 = \$262$
    - Life Insurance ( $\$65/\text{month} \times 12 \text{ months}$ )  $= \$780 \times .20 = \$288$
    - State Unemployment Insurance  $= \$189/\text{year} \times .20 = \$38$
- Total Employee Benefits Requested: \$3,160

Total Funding Request ( $\$9,600 + \$3,160$ ) = \$12,760

The % of funding requested for the project is less than the % of Largo residents to be served by the project. Our total

City of Largo CDBG funding request (\$12,760) is 8% of the total Senior Support Services budget in Pinellas (\$160,649). 47% (75 Largo Seniors/160 Total Seniors in Pinellas) of seniors served in Pinellas will be residents of Largo.

The Program Coordinator regularly schedules Small Group Companionship activities with senior living communities in the City of Largo. They provide marketing materials to promote activities among residents; lead high-energy, engaging activities that encourage social connection and long-term friendship; and connect seniors in need of additional services to community resources. She also helps seniors improve their well-being by connecting interested seniors with long-term, meaningful volunteer opportunities in the community that keep them active, purposeful, and socially connected, improving their well-being and helping them age-in-place.

TRUE STORY: Joanne, Mary, Cindy, and Luanne all live alone at Ranchero Village in Largo. They were desperate for social connection, despite living a few steps away from other seniors facing the same battle with loneliness. Unsure of how to get to know their neighbors, they remained in their small apartments, alone, passing the time. Then, Seniors in Service began leading Small Group Companionship activities in the Community Room. Joanne, Mary, Cindy, and Luanne, each saw the flyer posted throughout the building and decided to come for Companionship Bingo. They had a great time, laughing together and learning about their neighbors. Each one returned for the next activity and the next. Their friendship began to blossom.

When the Pinellas Homeless Leadership Alliance called Seniors in Service for volunteer support packing Cold Weather Kits to distribute to homeless individuals, our Program Coordinator jumped at the opportunity. Every day, we hear stories of how volunteering improves the mental and physical well-being of seniors. She wanted to bring this experience to the residents at Ranchero Village as a Small Group Companionship activity focused on service to others. Of course, Joanne, Mary, Cindy, and Luanne joined the service project, along with 38 of their neighbors. Everyone was excited to help the community. This service project cemented Joanne, Mary, Cindy, and Luanne's friendship. They bonded over how good volunteer service made them feel. Now Joanne, Mary, Cindy, and Luanne volunteer together at the Disability Achievement Center in Largo. Instead of sitting alone in their apartment, they have a network of friends and a new sense of purpose, keeping them active and healthy through service to others.

Our Program Coordinator helps the most isolated, lonely seniors, like Joanne, Mary, Cindy, and Luanne develop long-term social networks, improves their access to critical services, and provides opportunities to stay active and purposeful through meaningful volunteer opportunities.

### **B.3. Describe how the project meets one or more of the City of Largo's 2024-2025 priorities:**

#### **1) To provide housing, homeless, and special needs services**

#### **2) To add, expand or improve public facilities that will provide supportive services to low-and moderate households**

Small Group Companionship meets City of Largo's 2024-2025 priority to provide special needs services for low-to-moderate income elders, age 62+ who reside in the City of Largo. Small Group Companionship activities provide a low-barrier solution to senior isolation to help low-to-moderate income seniors physically, mentally and economically thrive in Largo.

Elders who lack support from family or friends are at high-risk for isolation and loneliness which has devastating health consequences, including increased risk of disease, 29% increased risk of heart disease and a 32% increased risk of stroke. It is also associated with increased risk for anxiety, depression, and dementia. Additionally, the lack of social connection may increase susceptibility to viruses and respiratory illness. Older adults have the highest rates of social isolation yet are hesitant to ask for help.

Small Group Companionship aligns with HUD Objectives to Create a Suitable Living Environment by providing low-

barrier services, meeting the most isolated seniors where they live, provide activities intentionally designed to help residents build friendships with their neighbors, and connect them with additional supportive resources as needed. As a result elders improve social connection and increase their ability to age in place.

**B.4. Provide information to substantiate the project as an “Eligible Activity” (described in the application instructions). Describe how the project, or the portion of the project funded by CDBG and/or SHIP, principally benefits low- and moderate-income Largo residents or low- and moderate-income areas in Largo (For CDBG clients/households whose annual income is less than or equal to 80% of area median income and for SHIP clients/households whose annual income is less than or equal to 140% of area median income).**

Small Group Companionship is an eligible activity under the regulations of the CDBG Program by providing companionship services for the special needs population of low-to-moderate income seniors age 62+ to help them physically, mentally, and economically thrive in Largo. We partner with low-to-moderate income senior living communities in the City of Largo to provide regularly scheduled Small Group Companionship Activities. Activities are intentionally designed to reduce senior isolation as residents build friendships with their neighbors, increase awareness of additional resources in the community that can improve their physical and mental health, and create a network of support within their senior living community to increase their capacity to age in place. The result, seniors increase their mental and physical well-being through activity and social connection and increase their capacity to age-in-place, avoiding costly assisted-living services.

**B.5. Describe the project area and client base that will benefit from this project (e.g. Citywide, countywide, Community Redevelopment District, homeless population, persons with HIV/AIDS, etc.)**

Small Group Companionship is a Citywide project to provide companionship for low-to-moderate income seniors, aged 62+ who reside in senior living communities in the City of Largo. Many lack support from family or friends, live alone, and are at high risk or loneliness and social isolation.

**B.6. Project Area/Clients Served**

*Submitted projects must provide services and/or benefit City of Largo residents*

**a) Provide data on the clients/households served by your agency for the same or similar service as the current project will provide.**

Clients/Households Served Prior Year	Number of Clients	% Low/Mod Clients
Total Clients Served with the same or similar service from October - September of the prior year:	208	100.00%
Of the Total Clients Served - the number of clients that were from Largo:	38	100.00%

**b) Provide data on clients/households to be served by your agency for the proposed project.**

Planned Program Year (Oct 2024-Sept 2025)	Number of Clients	% Low/Mode Clients
Total Estimated Clients/Households to be Served:	160	100.00%
Of the Total Estimated Served - number of Clients/Households from Largo	75	100.00%

**B.7. Client Eligibility:**

a) Does this project ONLY serve any of the following groups (check off which group it will serve):

- Abused Children
- Battered Spouses
- Elderly Persons (62+)
- Homeless Persons
- Illiterate Adults
- Persons Living with AIDS
- Migrant Farm Workers
- Severely Disabled Adults
- This project is not limited to any of these groups.

b) If the project is NOT limited to serving one of the above groups, describe your agency’s method for collecting demographic and income data from the clients served by this project. For new projects, explain what process will be used to ensure at least 51% of the clients served are below 80% of area median income.

N/A

c) If the project is limited to serving one of the above groups, describe how the demographic data (race/ethnicity) is collected (also required for reporting for CDBG-funded projects).

Small Group Companionship participants self-identify gender, age, race and ethnicity through sign-in sheets at each Small Group Companionship event.

### B.8. Project/Program Outcomes

**Describe the expected performance outcomes from the proposed project and any relevant performance measures or outcome data related to prior experience by the agency for the same or similar project/program (e.g. 50% of clients moved from shelter to permanent housing and it is anticipated that the proposed project will enable the agency to increase this outcome to 60% moved into permanent housing). For homeless programs, the City will also pull data from PHMIS to review past outcomes.**

Expected Performance Outcome for Proposed Small Group Companionship: At least 80% (60/75) of low-to-moderate income seniors, aged 62+ in Largo will report improved social support, improved access to critical services, and/or improved capacity for independent living as a result of interventions provided by Small Group Companionship.

Seniors in Service has 40+ years of experience providing Companionship Services in Pinellas and Hillsborough County including:

- Through funding provided by Pinellas CDBG and AmeriCorps Seniors, we implemented Small Group Companionship activities in low-to-moderate income senior living communities throughout Pinellas County, such as Arlington Arbor, Oceanside Apartments, and Casa Miguel Apartments. Last year we served 170 seniors in Pinellas County through Small Group Companionship. 100% (170/170) reported increased social support or improved capacity for independent living.

- Our Small Group Senior Companionship initiative in Sun City Center reduces loneliness for over 500 seniors through monthly “club” meetings to develop meaningful social bonds with peers who share common interests. This project is

funded by Hillsborough County CDBG and an AmeriCorps Seniors grant that demonstrates new ways to offer senior companionship. We have over 10 established clubs and continue to add more based on need and interests. Clubs focus on both social connection and addressing a need to improve the quality of life of seniors in Sun City Center. Examples include Kindred Spirits, provides social outings and education opportunities such as Fraud Prevention for widows. Low-Vision Support Group provides education/resources from community experts to help low-vision and blind seniors remain independent; Garden Club unites seniors around a common interest of gardening and provides fresh vegetables in a food desert area of Sun City Center. Other Clubs include: Veterans Group, Volunteer Club, Do You Wanna Dance?, and Cooking Club.

TRUE STORY: Bridget, whose macular degeneration makes it impossible to read her mail, felt distraught that she couldn't check her bank statements. Now, as a member of our Low-Vision Support Group, she benefited from moral support from her peers on a recent "field trip" to Tampa's Lighthouse for the Blind & Low Vision, where she was introduced to electronic magnifiers for reading mail and braille UNO cards so she can play cards with her friends again.

- For over 40 years we've been the sole provider of the AmeriCorps Seniors Senior Companion Program in Pinellas and Hillsborough County. We engage screened, trained volunteers to provide one-on-one companionship in-person and/or through telephone reassurance to help isolated low-income seniors or adults with disabilities overcome loneliness, improve their mental/physical well-being and increase their ability to age in place. Last year we served 181 seniors, 81% (147/181) reported increased social support or improved capacity for independent living.

#### **B.9. Relocation**

**a) Will any residents be permanently displaced as part of this project?**

No

**If yes, explain**

b) Residential Projects (*Applicants for residential projects only complete this section*)

**i. Do/ will residents pay rent?**

**ii. If yes, how much and how are rents determined?**

**iii. Will residents receive rental subsidy/housing assistance?**

**iv. If residents will not pay rent, state the reason:**

**v. List the residential facilities and addresses of facilities presently operated by your agency**

#### **B.10. Specific Site Location**

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a) Has the project site(s) been selected

No

b) If yes, provide the address. For educational classes/seminars, please list the location(s) where the classes will be held:

Facility Name	Street Address	City	State	Zip
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**B.11. Project Administration**

a) Project Manager Name

Sarah Rosenbaum

Title

Pinellas Senior Programs Coordinator

B.12. **Project-Specific Sections:** Please complete the sections below that are applicable to your project.

**DOWNPAYMENT ASSISTANCE ADMINISTRATION PROJECTS ONLY:**

a) Describe your agency's experience with administering a downpayment assistance program. Include information regarding the agency's experience with completing Residential Income Certifications and underwriting.

b) Is your agency a HUD-Certified Housing Counseling agency? *Please attach HUD-certification in the Documents section of the application.*

c) Is your agency able to offer bi-lingual services for processing downpayment assistance?

d) Does your agency also provide HUD-certified homebuyer education and counseling services?

e) Is your agency located in the City of Largo, within close proximity to Largo, or has the ability to meet clients at a local location for accessibility to services?

f) The City utilizes an online software for its housing programs:

Would your agency be willing to utilize the web-based housing software if provided access?

g) Does the agency have the capability to securely upload documents into the software (scanner, etc.)?

## HOUSING COUNSELING/EDUCATION SERVICES ONLY:

a) Is your agency a HUD-Certified Housing Counseling Agency? *Upload a copy of the HUD certification in the Documents section of the application*

b) Are the staff that will be providing the housing counseling and/or education HUD-certified? *Upload a copy of the HUD Certification in the Documents section of the application.*

c) Select which types of classes/counseling services for which your agency is requesting funding (select all that apply):

- Financial Fitness/Budgeting *(required for the City's downpayment programs)*
- Homebuyer Education Class *(required for the City's downpayment programs)*
- Homebuyer Housing Counseling (one-on-one) *(required for the City's downpayment programs)*
- Rental Counseling: Provide housing counseling for delinquent renters and/or tenants facing eviction.
- Foreclosure Prevention Counseling

d) Does your agency have all HUD requirements for the provision of homeownership counseling incorporated into its homebuyer education/housing counseling curriculum? (Deadline for compliance was January 14, 2017)

e) Describe the key components, format, and client follow-up used by your agency for the homebuyer education and/or housing counseling services requested in this application (describe each service separately if applying for more than one service):

## HOMELESS SHELTER SERVICES ONLY

*All homeless services applications should be focused on rapidly moving people into permanent housing (Housing First) and then wrapping supportive services around clients to help them successfully remain in permanent housing. Applications should also demonstrate how your agency has reduced barriers to access its services/programs.*

a) Complete the Pinellas Homeless Leadership Board's [Housing First Survey](#) and upload it to the **F. Required Documents** section of this application.

b) Does your agency currently participate in the countywide Coordinated Entry System and enter client data into Pinellas Homeless Management Information System (PHMIS)?

c) Describe what steps, programs and/or methods will be used to prevent homelessness from recurring.

d) Using program data from PHMIS, provide data below on your agency's outcomes from the past PHMIS reporting

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year for the following:

- Total number of unduplicated clients served and time period of data
- Average VI-SPDAT score of clients served
- % of clients that exited to permanent housing/supportive housing
- % of clients housed that returned to homelessness in 6 months (recidivism rate)
- Average length in program
- % of clients who gained income (earned or unearned) during the time they were enrolled in this program

e) How will the funding requested to Largo be used to support maintaining/improving these outcomes?

f) Do your agency have priorities established to serve Pinellas County homeless residents or limitations on serving newer arrivals from outside the County?

#### **CAPITAL IMPROVEMENTS PROJECTS ONLY**

a) Provide a summary of the services provided/to be provided at this facility. Explain if the proposed improvements are limited to a certain service or all services provided at the facility.

b) Explain how the facility and programs based at the facility are geographically accessible to Largo residents. Include any accommodations made to improve accessibility, such as virtual options or in-home services as well.

c) Describe how the project meets the City's CDBG Goal: SUPPORTIVE SERVICES – Capital Improvements: Add, expand or improve public facilities that (will) provide supportive services predominantly to low- and moderate-income clientele/households/areas that will help Largo residents physically, mentally and economically thrive in Largo. Projects that improve energy efficiency to enable service providers to more effectively use their operating funds toward client services, and/or projects that harden such facilities to improve disaster resiliency would also be supported. Projects that add/expand of emergency shelter services for families with minor children experiencing literal homelessness would also be supported.

d) Disaster Hardening/Energy Efficiency

Does the project include any disaster hardening components or energy efficiency improvements? Please click all that apply below and explain.

- Disaster Hardening
- Energy Efficiency Improvements
- N/A- No Hardening or Energy Components Included in Project Scope

e) Is the facility to be improved, expanded, or added located in Largo City Limits? Check the Property Appraiser website for the Tax Code. Tax Code is "LA" for Largo).

Please Explain

f) Capital projects located in a Special Flood Hazard Area will not be funded under this funding cycle. Is the property located in a Special Flood Hazard Area? (Without Base Flood Elevation: Flood Zone A, V or A99; with Base Flood Elevation: Zone AE, AO, AH, VE, AR or in a Regulatory Floodway)?

g) Are there any known environmental hazards on the project area (ex. located in a Brownfield, located near to a landfill)?

h) The agency must confirm with the jurisdiction that the property is located in that the proposed facility use is allowable. **Written confirmation (email or letter/zoning letter) must be uploaded in the Required Document section of the application.**

## C. Timeline

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## C. Timeline

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Please provide the following information.

### C.1 Project Timeline

Provide an implementation schedule. Include all project phases. (In order to ensure that project costs are reimbursable, or are eligible for direct payment, no costs that the agency plans to bill to Largo CDBG should be incurred until the formal agreement has been made based on the City's grant award).

Please review the Application Instructions regarding timeline for more guidance.

Phase	Beginning Date	Ending Date
Program/Services	10/01/2024	09/30/2025
Obtain Full Project Funding	10/01/2024	09/30/2025
Design/Scope of Work	10/01/2024	09/30/2025
Project Bid	M/d/yyyy	M/d/yyyy
Permitting	M/d/yyyy	M/d/yyyy
Construction	M/d/yyyy	M/d/yyyy

## D. Budget & Funding

Case Id: 25294

Name: Seniors in Service of Tampa Bay, Inc. - 2024/25

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### D. Budget & Funding

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Please provide the following information.

Public Services (Supportive Services) \* must have a minimum of \$10,000 in funding request.

Public Facility Capital Projects-\* must have a minimum of \$40,000 in funding request.

#### D.1. Project Budget

##### a) Include costs associated with this project (City Funds and Other Funding Sources)

Project Budget Line Item	Largo CDBG Funding	Other Funding Sources	Total Budget
Program Coordinator Salary (20% City of Largo CDBG, 80% Other Funding)	\$9,600.00	\$38,400.00	\$48,000.00
Program Coordinator Benefits (20% City of Largo, 80% Other Funding)	\$3,160.00	\$12,218.00	\$15,378.00
Administrative Staff Salaries and Benefits (Human Resources, Finance, Outreach ) allocated to the project	\$0.00	\$78,448.00	\$78,448.00
Staff Training	\$0.00	\$800.00	\$800.00
Volunteer Training	\$0.00	\$400.00	\$400.00
Volunteer Background Checks	\$0.00	\$936.00	\$936.00
Program Expenses including marketing, office/program supplies	\$0.00	\$10,877.00	\$10,877.00
Program Coordinator Local Travel to Companionship Activities and Community Partners reimbursed at \$.655/mile	\$0.00	\$4,871.00	\$4,871.00
Operating Costs (Copier, Software, Occupancy)	\$0.00	\$939.00	\$939.00
Grand Total	\$12,760.00	\$147,889.00	\$160,649.00

##### b) Will this project generate program income?

No

##### c) Select what basis for payment is being requested:

Direct Costs (reimbursement)

Please List Each Activity and Associated Fee for Service (or hourly fee per client)

Fee-for-Service	Service Name
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**D.2. Funding Sources**

**a) List all funding sources to be used for the project. If other grant funds have/will be applied for, but the final allocation has not been determined, put these amounts in the "Funds Requested" column.**

Funding Source(s)	Funds Requested	Funds Allocated
AmeriCorps Seniors	\$127,889.00	\$127,889.00
Pinellas Community Foundation	\$20,000.00	\$20,000.00
City of Largo CDBG	\$12,760.00	\$0.00
	\$160,649.00	\$147,889.00

**b) If the grant request is not fully funded, will the project still be viable, even if on a smaller scale? (Please explain)**

Yes

**Explain:**

If Small Group Companionship is not fully funded, the project is still viable but fewer isolated seniors in Largo will receive the benefits of Small Group Companionship for improved social connection and capacity to age in place.

**c) Project costs are reimbursed by the City on a monthly/quarterly basis. For public services, project costs are reimbursed by the City on a monthly or quarterly basis. For public facilities projects, project costs are typically reimbursed at the end of the project or up to 3 reimbursements for larger projects. Does the agency have the financial capacity to pay for the portion of the cost funded by City grant during the project and be reimbursed on a monthly/quarterly basis for public services?**

Yes

**d) Please indicate the frequency your agency will be remitting invoices. If awarded funding, public services reporting will be set up on the same schedule (e.g. monthly invoices will have monthly reporting). Reporting for public facilities will be quarterly.**

Public Services-Monthly Invoicing

**D.3. Audit Requirements**

**a) Does your agency's current year budget, or next year's anticipated budget, include \$750,000 or more in federal funding revenue? *If yes, a single or program-specific audit must be conducted at the end of your agency's fiscal year.***

Yes

**b) Does your agency's current year budget, or next year's anticipated budget, include \$500,000 or more in state funding revenue? *If your agency is awarded SHIP funding and the answer to this question is "Yes", a single or program-specific audit must be conducted at the end of your agency's fiscal year.***

## E. Agency Information

Completed by [ringles@seniorsinservice.org](mailto:ringles@seniorsinservice.org) on 2/13/2024 11:44 AM

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## E. Agency Information

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Please provide a brief summary (no more than 1-2 paragraphs on each of the following topics regarding the agency).

### E.1. Background/Program Experience (1-2 paragraphs only)

**Include the length of time the agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. Describe the type of services provided, the agency's capabilities, the number of clients served, and license to operate (if appropriate).**

Founded in August 1984 as a Florida nonprofit 501(c)3, our mission is to provide solutions to community challenges by engaging volunteers aged 55+. We help disadvantaged children, frail elders, overwhelmed caregivers, disabled adults, struggling veterans, hungry families and more. Our volunteers also benefit from staying active and purposeful. We engage 1500+ volunteers annually in collaboration with 150+ community partners to help 8000+ underserved individuals.

During 40 years of service, we have provided over 5,000,000 hours of community assistance with fair market value exceeding \$1,316,000. We are a fiscally conscious, financially stable non-profit recognized for our track record of successful outcomes. Our recent Independent Audit shows over 94% of each dollar goes to program services.

### E.2. Personnel/Staff Capacity(1-2 paragraphs only)

**a) Briefly describe the agency's existing staff positions and qualifications, its capacity to carry out this project.**

CEO Robin Ingles was initially lured to Seniors in Service as a volunteer. As our 1st ever Marketing Director, she fell in love with the mission so when offered the CEO position in 2019, she jumped at the chance. She has 20+ years of experience in Finance, Marketing, Operations, Team building, and Leadership. She oversees federal/state/county/city contracts/grants & restricted/unrestricted funds, including CDBG. Education includes B.S. Accounting, Wake Forest University. Programs Director Lorena Mielke: 5+ years program implementation/reporting, volunteer management, staff supervision, and assessment/support experience with our Education Programs. Based on her exceptional performance as a leader, she was recently promoted to Programs Director, managing outcomes and compliance for all Seniors in Service programs. Education includes BA in International Studies, Minor in Business Administration, University of South Florida.

Pinellas Program Coordinator Sarah Rosenbaum brings invaluable experience from her previous roles in management, sales, and customer engagement in both the for-profit and nonprofit sectors. She has 6+ years of experience as the Pinellas Seniors Program Coordinator demonstrating her strong leadership, management, communication, and collaboration skills. A recognized leader, she mentors staff members and volunteers of all ages and ethnicities, helping them feel purposeful, valued, and empowered with a focus on not only achieving, but exceeding our contractual outcomes to maximize community impact. This combined with her people-centric nature and innate compassion make her ideal for leading the Small Support Group program in Pinellas.

**b) Does the agency have a personal policy manual?**

Yes



**c) Does the agency have an Affirmative Action Plan?**

Yes

**d) Does the agency have a Grievance procedure?**

Yes

**E.3. Financial Capacity (1-2 paragraphs only)**

**Attach a copy of the agency's current operating budget, including revenues and expenditures. Identify commitments for ongoing funding. Describe the agency's fiscal management, including financial reporting, record keeping, accounting systems, payment procedures and audit requirements.**

Our founding sponsor (and largest funder) is AmeriCorps Seniors which currently provides close to \$1.9 Million of federal funds to support 6 major programs throughout Hillsborough, Pasco & Pinellas Counties: the Foster Grandparent Program (\$791,511); the Senior Companion Program (\$347,455); 3 Retired & Senior Volunteer Programs (RSVP Hillsborough (\$88,039), RSVP Pasco (\$109,522), and RSVP Pinellas (\$125,389); & Operation: Veteran Connect (\$417,457). We have successfully secured Hillsborough County CDBG funds for 2023-2024 (\$100,655). We have secured annual funding from United Way Suncoast (\$105,000) Juvenile Welfare Board of Pinellas County (\$322,680) & Children's Board of Hillsborough County (\$242,839) to support our Classroom Grandparent Program.

The Board of Directors provide fiduciary responsibility & oversight of Financial Management. By delegation of the Board, the CEO is responsible for operational oversight and fiscal accountability. She works closely with the Board Treasurer to develop annual operating budget for review by the Finance & Investment Committee. Committee recommends the proposed budget which is presented to the full Board by the Treasurer for approval. Monthly, the CEO reviews financial statements for accuracy & variances from planned budget. Quarterly, CEO presents financial reports to Finance & Investment Committee, including Statements of Financial Position & Financial Activity which contain budget to actual variances, & cash flow projections. Then it is presented to the full Board by the Treasurer. Check signers include the Treasurer & Chair. We operate following our written Financial Policies & Procedures (our Board-approved Financial and Investment Policy) along with our Accounting Policies & Procedures, which follow the OMB Super Circular (CFR 200) requirements. Seniors in Service maintains 3 months of operating cash reserves to ensure that it is able to manage cash flow. We receive an annual independent audit following OMB A-13

**E.4. Monitoring (1-2 paragraphs only)**

**Briefly describe how you will monitor progress in implementing the program. Describe how funding and related project costs will be tracked separately in the agency and how the agency will ensure that expenses are not paid from duplicate sources. Describe who will be responsible for monitoring progress.**

Standard Operating Procedure for each funded program includes a timeline with benchmarks for outputs, outcomes, and reporting. Director of Programs meets with Program Coordinator monthly to review progress. If benchmarks are not met, strategies are implemented to get back on target to achieve outputs/outcomes.

The CEO ensures administrative and fiscal support to successfully implement the Board-approved budget using skills built through her years of successful experience with federally funded, other governmental, and privately funded projects, developing and overseeing fiscal policies and procedures that inform day-to-day operations. Seniors in Service operates following our written Financial Policies & Procedures (our Board-approved Financial and Investment Policy) along with our Accounting Policies and Procedures, which follow the OMB Super Circular (CFR 200) requirements. One example of how a procedure is used in daily operations for managing our grants is: "The appropriate supervisor will code each invoice for expenditures detailing the General Ledger account the expense is to be charged to as well as the class code which identifies the grant and/or contract the expense will be charged following approved contract budget." As

reported in our annual independent financial audits, Seniors in Service maintains strong internal controls to ensure our fiscal integrity. Internal controls include appropriate segregation of duties, two-tiered approval process for expenditures, Board-approved financial and investment policies and procedures, regular financial reporting to the Board of Directors and Finance & Investment committee, and an annual independent financial audit engaged by the Board of Directors and reported to the Board of Directors at a designated Board meeting.

**E.5. Insurance/Bonding/Worker's Compensation (1-2 paragraphs only)**

**State whether or not the agency has liability insurance coverage, in what amount, and with what insuring agency.**

**State whether the agency pays all payroll taxes and worker's compensation as required by Federal and state laws.**

**State whether or not the agency has fidelity bond coverage for principle staff who handle the agency's accounts, in what amount and with what insuring agency.**

Seniors in Service has general liability insurance at \$1,000,000 per occurrence and \$3,000,000 general aggregate with Roe Insurance, Inc. Seniors in Service pays all payroll taxes and workers' compensation as required by Federal and state laws. Seniors in Service has D&O Liability and EPLI coverage at \$1,000,000 per occurrence and \$1,000,000 in aggregate through Roe Insurance, Inc.

## F. Required Documents

Completed by ringles@seniorsinservice.org on 2/13/2024 11:47 AM

Case Id: 25294

Name: Seniors in Service of Tampa Bay, Inc. - 2024/25

Address: 1306 W. Sligh Ave, Tampa, FL 33604

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## F. Required Documents

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Please provide the following information.

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### Documentation

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**Organizational Chart \*Required**

1 Org Chart 240123.pdf

**Board Resolution Authorizing Submittal of Funding Request \*Required**

2 Board Resolution.pdf

**Current Year Operating Budget \*Required**

3 2024 Board Approved Budget.pdf

**Most Recent Annual Independent Auditor's Report \*Required**

4 Audit 2022 Seniors in Service of Tampa Bay Inc.pdf

**List of Board of Directors \*Required**

5 Board of Directors Roster 2024-240108.pdf

**HUD Certificate - HUD-Approved Housing Counselors (if applicable)**

\*\*No files uploaded

**Housing First Checklist (if applicable)**

\*\*No files uploaded

**HUD Certificate - HUD-Approved Housing Counseling Agency (if applicable),**

*\*\*No files uploaded*

**Informational pamphlets about the agency (Optional)**

February Newsletter 2024 (1).pdf

**501(c)3 Letter/Non-Profit Letter (if applicable)**

6 501c3 Status Letter.pdf

**Other Documents**

*\*\*No files uploaded*

## Submit

Completed by [ringles@seniorsinservice.org](mailto:ringles@seniorsinservice.org) on 2/13/2024 11:49 AM

**Case Id:** 25294

**Name:** Seniors in Service of Tampa Bay, Inc. - 2024/25

**Address:** 1306 W. Sligh Ave, Tampa, FL 33604

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## Submit

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I certify that I have been authorized by the applicant's governing body to submit this application and that the information contained herein is true and correct to the best of my knowledge.

### Authorized Name and Title

Robin Ingles, CEO

### Telephone

(813) 368-6746

### Authorized Signature

Robin Ingles

*Electronically signed by [ringles@seniorsinservice.org](mailto:ringles@seniorsinservice.org) on 2/13/2024 11:48 AM*

# IDIS Set Up

No data saved

**Case Id:** 25294

**Name:** Seniors in Service of Tampa Bay, Inc. - 2024/25

**Address:** 1306 W. Sligh Ave, Tampa, FL 33604

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## IDIS Set Up

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Please provide the following information.

**Activity Name**

**National Objective**

**Activity Number**

**National Objective Citation**

**Activity Description**

**HUD Matrix Code**

**Activity Type**

**HUD Matrix Citation**

**Service Area**

**Method Used for Determining LMI**

**Action Plan Project**

**Accomplishment Type**

**Completion Deadline**

**Eligibility Determination**

**Funds Requested**

\$0.00

**Eligibility Comments/Conditions**

**Funds Prop./Awarded**

\$0.00

**Housing Manager Signature**

*\*\*Not signed*

**Funding Source(s)**

**Approval Date**

**Is this project subject to Davis Bacon Act?**

**Is this project subject to Section 3?**

**Is this project subject to BABA Act?**

*Printed By: Sheera Greene on 2/15/2024*

**Explanation of BABA Act Determination Documentation:**

**BABA Act Documentation**

## Subrecipient Award

No data saved

**Case Id:** 25294

**Name:** Seniors in Service of Tampa Bay, Inc. - 2024/25

**Address:** 1306 W. Sligh Ave, Tampa, FL 33604

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### Subrecipient Award

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Please provide the following information.

#### Award Letter

Award Letter

*\*\*No files uploaded*

#### Subrecipient Agreement

Subrecipient Agreement

*\*\*No files uploaded*

#### Purchase Order

Purchase Order

*\*\*No files uploaded*

#### Purchase Order Number

#### Changer Order PO (if applicable)



# LURA/Equity Sharing

No data saved

**Case Id:** 25294

**Name:** Seniors in Service of Tampa Bay, Inc. - 2024/25

**Address:** 1306 W. Sligh Ave, Tampa, FL 33604

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## LURA/Equity Sharing

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Please provide the following information.

**L.1 LURA/Equity Sharing Start Date**

**L.2 LURA/Equity Sharing End Date**

**L.3 LURA Comments/Notes**

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## Documentation

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**Land Use Restriction Agreement**

*\*\*No files uploaded*