

FEDERALLY-FUNDED SUBAWARD AND FUNDING ASSISTANCE AGREEMENT

The following information is provided pursuant to 2 C.F.R. §200.331(a)(1):

Name of sub-recipient: **YMCA of Southwest Florida, Inc.**

SAM Organization Identifier: **T8JWE9MHJFQ4**

ARPA Unique Identification Number: **ARPA-NE255E**

Federal Award Identification Number: **SLT-2390**

Federal Award Date: **June 14, 2021 (first payment/tranche received)**

Subaward Period of Performance: Start Date: **June 1, 2022**

Subaward Period of Performance: End Date: **December 31, 2024**

Total Amount Obligated by this Action: **\$ 490,910**

Total Federal Obligation by Lee County to Sub-recipient: (including this obligation) **\$ 490,910**

Total Federal Award Commitments by Lee County to Sub-recipient: **\$ 490,910**

Award is R&D: **NO**

Program Description: On March 11, 2021, the American Rescue Plan Act (ARPA) was signed into law by the President. Section 9901 of ARPA amended Title VI of the Social Security Act (the Act) to add section 602, which establishes the Coronavirus State Fiscal Recovery Fund, and section 603, which establishes the Coronavirus Local Fiscal Recovery Fund (together, the Fiscal Recovery Funds). The Fiscal Recovery Funds are intended to provide support to state, local, and tribal governments (together, recipients) in responding to the impact of COVID–19 and in their efforts to contain COVID–19 on their communities, residents, and businesses. The Fiscal Recovery Funds build on and expand the support provided to these governments over the last year, including through the Coronavirus Relief Fund (C.R.F.).

The American Rescue Plan will deliver \$350 billion for state, local, territorial, and tribal governments to respond to the COVID-19 emergency and restore jobs. The Coronavirus State and Local Fiscal Recovery Funds provide a substantial infusion of resources to help turn the tide on the pandemic, address its economic fallout, and lay the foundation for a strong and equitable recovery. Recipients may use Coronavirus State and Local Fiscal Recovery Funds to:

- Support public health expenditures by funding COVID-19 mitigation efforts, medical expenses, behavioral healthcare, and certain public health and safety staff;
- Address negative economic impacts caused by the public health emergency, including economic harms to workers, households, small businesses, impacted industries, and the public sector;
- Replace lost public sector revenue by using this funding to provide government services to the extent of the reduction in revenue experienced due to the pandemic;
- Provide premium pay for essential workers by offering additional support to those who have borne and will bear the greatest health risks because of their service in critical infrastructure sectors; and,

- Invest in water, sewer, and broadband infrastructure by making necessary investments to improve access to clean drinking water, to support vital wastewater and stormwater infrastructure, and to expand access to broadband internet.

Federal awarding agency: **U.S. Department of Treasury**

Pass-through entity: **Lee County, FL**

CFDA number: **21.027**

CFDA name: **Coronavirus State and Local Fiscal Recovery Funds (CSLFRF)**

R&D designation: **Non R&D**

Should you have any question about this sub-award, please contact: **Glen Salyer, Assistant County Manager at 239-533-2221**

As required by Federal Regulations and the terms and conditions of this award, the applicant agrees to complete and sign this document to ensure that they are eligible for any future COVID-19 funding from Lee County. This also includes that the Sub recipient agrees to report any fraud, waste or abuse of these funds to Lee County Administration.

**SUBRECIPIENT CONTRACT BETWEEN
THE LEE BOARD OF COUNTY COMMISSIONERS
AND YMCA OF SOUTHWEST FLORIDA, INC.**

THIS AGREEMENT is entered into by Lee County, a charter county and political subdivision of the State of Florida, herein referred to as COUNTY and **YMCA of Southwest Florida, Inc.** whose address is **701 Center Road, Venice, FL 34285**, herein referred to as SUBRECIPIENT.

RECITALS

WHEREAS, Lee County is a body corporate and politic established under the Florida Constitution and the Laws of Florida, and is authorized to, among other things, accept and administer grants from State and Federal authorities to enhance the quality of life in Lee County; and

WHEREAS, Congress passed the American Rescue Plan Act (ARPA) on March 10, 2021 and President Biden signed the American Rescue Plan Act into law on March 11, 2021; and

WHEREAS, the American Rescue Plan Act, in part, amends the Social Security Act (42 U.S.C. 601) by establishing the Fund in the amount of \$350 billion dollars for payments to States, Tribal governments and units of local government based on their populations.

WHEREAS, Lee County accepted American Rescue Plan Act funding from the United States Department of the Treasury; and

WHEREAS, this Agreement is consistent with American Rescue Plan Act guidelines to respond to the public health emergency or its negative economic impacts; and

WHEREAS, the SUBRECIPIENT requests and the COUNTY agrees, to provide funding to the SUBRECIPIENT for eligible expenditures under the American Rescue Plan Act, specifically pursuant to the terms and conditions specified herein relating to COVID-19; and

NOW, THEREFORE, in consideration of the mutual covenants, promises, and representations contained in this Agreement and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

Section 1. Recitals

The foregoing recitals are true and correct and form a material part of this Agreement upon which the Parties relied.

Section 2. Term

This Agreement is effective upon full execution by both parties and ends on December 31, 2024 unless terminated earlier in accordance with this Agreement.

The Subaward Period of Performance is from June 1, 2022 and ends on December 31, 2024.

The Subaward Budget Period is from June 1, 2022 and ends on December 31, 2024.

Section 3. American Rescue Plan Act Funding

- a) The American Rescue Plan (ARP) Act, Section 603(c)(1) of the Social Security Act, established the \$350 billion Coronavirus State and Local Fiscal Recovery Funds. The United States Department of Treasury made payments from the Fund to States and eligible units of local government. The American Rescue Plan Act requires that payments from the Coronavirus State and Local Fiscal Recovery Fund (CSLFRF) only be used to cover expenses that: (a) To respond to the public health emergency or its negative economic impacts, including assistance to households, small businesses, and nonprofits, or aid to impacted industries such as tourism, travel, and hospitality; (b) To respond to workers performing essential work during the COVID-19 public health emergency by providing premium pay to eligible workers; (c) For the provision of government services to the extent of the reduction in revenue due to the COVID-19 public health emergency relative to revenues collected in the most recent full fiscal year prior to the emergency; and (d) To make necessary investments in water, sewer, or broadband infrastructure.
- b) For the purposes this Agreement, the COUNTY serves as the pass-through entity for a Federal award and the SUBRECIPIENT serves as the recipient of a sub award. This Agreement is entered into based on the following representations:
 - 1. The SUBRECIPIENT represents that it is fully qualified and eligible to receive these grant funds per the funding requirements.
 - 2. The COUNTY received these funds from the Federal government, and the COUNTY has the authority to sub grant these funds to the SUBRECIPIENT upon the terms and conditions outlined below.
 - 3. The COUNTY has authority to disburse the funds under this Agreement.

The COUNTY agrees to provide financial assistance to the SUBRECIPIENT in an amount not-to-exceed **\$ 490,910**. The SUBRECIPIENT must use this financial assistance for expenses eligible under 603(c)(1) of the Social Security Act, specifically the Coronavirus State and Local Fiscal Recovery Fund (CSLFRF) to mitigate financial hardships incurred because of COVID-19 during the Term. These funds must be spent in accordance with the guidance on the United States Treasury's website <https://home.treasury.gov/policy-issues/coronavirus/assistance-for-state-local-and-tribal-governments/state-and-local-fiscal-recovery-funds>. SUBRECIPIENTS are responsible for ensuring that any procurement using CSLFRF funds, or payments under procurement contracts using such funds are consistent with the procurement standards set forth in the Uniform Guidance at 2 CFR 200.317 through 2 CFR 200.327, and Appendix II to Part 200, as applicable.

- c) SUBRECIPIENT is required to review the United States Treasury's website for updates to ensure compliance with the most updated CSLFRF guidance.
- d) For each SUBRECIPIENT, the COUNTY will assess the risk to successfully fulfilling the project objective pertaining to this agreement. The results of subrecipient risk assessments will have an effect on the frequency and level of scrutiny during the monitoring process and may result in additional requirements being imposed on the SUBRECIPIENT.

- e) The SUBRECIPIENT must comply with 2 CFR 200 for accounting standards and cost principles.
- f) The SUBRECIPIENT must comply with COUNTY rules and 2 CFR 200 for conflicts of interest.
- g) The SUBRECIPIENT shall be responsible for indirect cost associated with this grant.
- h) SUBRECIPIENT acknowledges that it has read, understands, will be bound by and agrees to have carried out, shall carry out, or cause to be carried out the terms, conditions, and services as described in the agreement attachments, including:
 - 1. ATTACHMENT A: PROJECT DETAILS – Overview (Need and Response), eligible activities.
 - 2. ATTACHMENT B: SCOPE OF WORK – Description of the SUBRECIPIENT's and the COUNTY's task, deliverables, timelines, and milestones. Additional United States Treasury scope requirements may be identify and required after the execution of this agreement.
 - 3. ATTACHMENT C: PROJECT BUDGET – Summary of the project's annual budget by expense category and budget justification by category.
 - 4. ATTACHMENT D: REPORTING REQUIREMENTS – Description of the reporting requirements. Additional United States Treasury reporting requirements may be identify and required after the execution of this agreement.
 - 5. ATTACHMENT E: EQUITY-BASED REQUIREMENT – Description of the project's equitable design and implementation by addressing the program's equity goals, awareness, access and distribution, and outcomes.
 - 6. ATTACHMENT F: EVIDENCE-BASED REQUIREMENT – Description of the supporting evidence or evidence-producing strategy related the project selection, design, and implementation.
 - 7. Award Payment:
 - a. All payments made under this Agreement shall be on a reimbursement basis. These reimbursement monies are from CFDA 21.027. In order to obtain reimbursement for expenditures, the SUBRECIPIENT must file with the COUNTY, through the portal, its request for reimbursement and any other information required to justify and support the payment request. Reimbursement requests may be submitted as frequently as monthly. The final reimbursement request is due on or before January 10, 2025, for costs incurred through December 31, 2024.
 - b. Reimbursement requests must include a certification, signed by an official who is authorized to legally bind the SUBRECIPIENT, which reads as follows:

By signing this request, I certify to the best of my knowledge and belief that the request is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the reimbursement. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729–3730 and 3801–3812).

- c. The COUNTY shall verify all documentation received prior to expending Funds under this Agreement and may request additional documentation, if needed. Reimbursements will only be made for expenditures that the COUNTY provisionally determines are eligible under the CSLFRF. The COUNTY retains the right to deny any requests for Funds under this Agreement if in the COUNTY’S sole discretion the request is not for and documentation does not substantiate an eligible expenditure. However, the COUNTY’S provisional determination that an expenditure is eligible does not relieve the SUBRECIPIENT of its duty to repay the COUNTY for any expenditures that are later determined by the COUNTY or the Federal government to be ineligible.
- d. COUNTY shall not be liable to any vendor, supplier or subcontractor for any expenses or liabilities incurred in connection with any Project and SUBRECIPIENT shall be solely liable for such expenses and liabilities.
- e. SUBRECIPIENT acknowledges that the COUNTY intends to award a portion of the CSLFRF funding to SUBRECIPIENT, and further acknowledges that the CSLFRF funding may be utilized only for the uses authorized by American Rescue Plan Act. Accordingly, SUBRECIPIENT covenants that the use of the CSLFRF funding by SUBRECIPIENT pursuant to this Agreement is limited to only those uses for which the CSLFRF funding may be utilized under American Rescue Plan Act.
- f. SUBRECIPIENT will retain any equipment purchased with CSLFRF funding through December 31, 2026.

Section 4. Enforcement

SUBRECIPIENT certifies that the information provided is complete, accurate, and current demonstrating SUBRECIPIENT’S eligibility to receive the Funds. SUBRECIPIENT is liable for recapture of Funds if any representation made in the reimbursement requests, reporting or supporting documentation is at any time false or misleading in any respect, or if SUBRECIPIENT is found in non-compliance with laws, rules or regulations governing the use of the Funds provided pursuant to this Agreement. The provisions of this Section 4 shall survive the termination of this Agreement.

Section 5. Recapture of Expenses

- A. Any funds that are not expended as authorized under this Agreement must be refunded to the COUNTY within fourteen (14) days of receipt of written notice provided by the COUNTY.
- B. Any funds that are not expended within the anticipated timeframe under this Agreement are subject to recapture. If requested, a refund to the COUNTY must be made within fourteen (14) days of receipt of written notice for a refund provided by the COUNTY.
- C. The COUNTY'S determination that an expenditure is eligible does not relieve the SUBRECIPIENT of its duty to repay the COUNTY in full for any expenditures that are later determined by the COUNTY or the Federal Government, in each of its sole discretion, to be ineligible expenditures or the discovery of a duplication of benefits.
- D. If requested by the COUNTY, all refunds, return of improper payments, or repayments due to the COUNTY under this Agreement are to be made payable to Lee County and mailed directly to the COUNTY pursuant to Section 18 Notice and this Agreement.
- E. The SUBRECIPIENT has responsibility for identifying and recovering grant funds that were expended in error, disallowed, or unused. The SUBRECIPIENT will also report all suspected fraud to the county.

Section 6. Maintenance and Review of Records

SUBRECIPIENT shall maintain all records and accounts, including property, personnel and financial records, contractual agreements, memoranda of understanding, subcontracts, proof of insurance, and any other records related to or resulting from the Agreement to assure a proper accounting and monitoring of all funds awarded and shall maintain all accounts pertaining to such services, including, but not limited to, property, personnel and financial records, and supporting documentation, and any additional records required as a result of or associated with the utilization of the CSLFRF funding as outlined in the United States Treasury Compliance and Reporting Guidance, State and Local Fiscal Recovery Funds, or as maybe amended, which, among other things, shall enable ready identification of SUBRECIPIENT'S cost of goods and use of funds. If any litigation, claim, negotiation, audit, monitoring, inspection or other action has been started before the expiration of the required record retention period, records must be retained until completion of the action and resolution of all issues that arise from it, or the end of the required period, whichever is later.

With respect to all matters covered by this Agreement, records will be made available for examination, audit, inspection or copying purposes at any time during normal business hours and as often as COUNTY may require. SUBRECIPIENT will permit same to be examined and excerpts or transcriptions made or duplicated from such records, and audits made of all contracts, invoices, materials, records of personnel and of employment and other data relating to all matters covered by this Agreement.

The SUBRECIPIENT must maintain records and financial documents in compliance with all standards in the ARPA CSLFRF guidance and 2 CFR 200. Generally, records and financial documents must be maintained for five years after all funds have been expended or returned. The COUNTY or Treasury may request transfer of records of long-term value at the end of such period. Wherever practicable, such records should be collected, transmitted, and stored in open and machine-readable formats.

SUBRECIPIENT must agree to provide or make available such records to the COUNTY upon request, to Treasury upon request, and to the Government Accountability Office ("GAO"), Treasury's Office of Inspector General ("OIG"), and their authorized representative in order to conduct audits or other investigations.

The COUNTY may access the SUBRECIPIENT records and financial statements as necessary to conduct monitoring activities.

Section 7. Monitoring

The SUBRECIPIENT agrees to permit persons duly authorized by the COUNTY, the Federal or State grantor agency (if applicable) or any representatives to inspect all records, papers, documents, facility's goods and services of the SUBRECIPIENT and/or interview any clients and employees of the SUBRECIPIENT to be assured of satisfactory performance of the terms and conditions of this contract to the extent permitted by the law after giving the SUBRECIPIENT reasonable notice. The monitoring is a limited scope review of the contract and agency management and does not relieve the SUBRECIPIENT of its obligation to manage the grant in accordance with applicable rules and sound management practices.

Following such monitoring, the COUNTY will deliver to the SUBRECIPIENT a written report regarding the manner in which services are being provided. The SUBRECIPIENT will rectify all noted deficiencies within the specified period of time indicated in the monitoring report or provide the COUNTY with a reasonable and acceptable justification for not correcting the noted shortcomings. The SUBRECIPIENT'S failure to correct or justify the deficiencies within the time specified by the COUNTY may result in the withholding of payments, being deemed in breach or default, or termination of this contract.

Section 8. Audits

A. The COUNTY may perform an audit of the records of the SUBRECIPIENT at any time during the Term of this Agreement and after final disbursements have been made, even if the Agreement has expired or terminated. Audits may be performed at a time mutually agreeable to the SUBRECIPIENT and the COUNTY. When conducting an audit of the SUBRECIPIENT'S performance under this Agreement, the COUNTY must use Generally Accepted Government Auditing Standards ("GAGAS"). As defined by 2 C.F.R. §200.50, GAGAS, also known as the Yellow Book, means generally accepted government auditing standards issued by the Comptroller General of the United States, which are applicable to financial audits.

B. If an audit shows that all or any portion of the Funds disbursed were not spent in accordance with the conditions of and strict compliance with this Agreement, the SUBRECIPIENT will be held liable for reimbursement to the COUNTY of all Funds not spent in accordance with these applicable regulations and this Agreement, within fourteen (14) days after the COUNTY has notified the SUBRECIPIENT of such non-compliance.

C. If the COUNTY elects to have the SUBRECIPIENT perform an audit, the SUBRECIPIENT must have all audits completed by an independent auditor, which is defined in § 215.97(2)(i), Florida Statutes, as "an independent certified public accountant licensed under chapter 473." The independent auditor must state that the audit complied with the applicable provisions noted above. The audits must be received by the COUNTY no later than six (6) months from the end of the SUBRECIPIENT'S fiscal year.

D. The SUBRECIPIENT must send copies of reporting packages required under this paragraph directly to the COUNTY in accordance with Section 18 Notice.

E. Single Audit Requirements. SUBRECIPIENTS, that expend more than \$750,000 in Federal awards during their fiscal year will be subject to an audit under the Single Audit Act and its implementing regulation at 2 C.F.R. Part 200, Subpart F regarding audit requirements.

Section 9. Closeout

SUBRECIPIENT will comply with all closeout procedures of the awards, to include full compliance with the agreement terms and conditions, ARPA, CSLFRF rule and guidance, and 2 CFR 200. Key tasks will be closeout communications, confirmation for maintenance of records and financial documents, receipt of all final reimbursement requests or payment requests, receipt of all financial reports and performance reports, fulfillment of any requests to reconcile reports and payment requests. The retention period per CSLFRF compliance and reporting is 5 years.

Section 10. Indemnification

SUBRECIPIENT shall indemnify, hold harmless, and defend COUNTY from and against any and all liabilities, losses, claims, damages, demands, expenses or actions, either at law or in equity, including court costs and attorneys' fees (at the trial and all appellate levels), that may hereafter at any time be made or brought by anyone on account of personal injury, property damage, loss of monies, or other loss, allegedly caused or incurred, in whole or in part, as a result of any negligent, wrongful, or intentional act or omission, or based on any act of fraud or defalcation or breach of any provision or covenant of this Agreement or applicable law by the SUBRECIPIENT, its agents, subcontractors, assigns, heirs, and employees resulting from or arising under this Agreement.

The provisions of this Section 11 shall survive the termination of this Agreement.

Section 11. Termination

This Agreement may be terminated by the SUBRECIPIENT or the COUNTY at any time, with Cause or without Cause, upon not less than thirty (30) days prior written notice delivered to the SUBRECIPIENT as provided for in this Agreement or, at the option of COUNTY, immediately in the event that SUBRECIPIENT fails to fulfill any of the terms, understandings, or covenants of this Agreement. COUNTY will not be obligated to pay for costs incurred by SUBRECIPIENT after SUBRECIPIENT has received notice of termination.

Section 12. Remedies

The COUNTY may exercise any other rights or remedies, which may be available under law. If the COUNTY waives any right or remedy in this Agreement or fails to insist on strict performance by the SUBRECIPIENT, it will not affect, extend or waive any other right or remedy of the COUNTY, or affect the later exercise of the same right or remedy by the COUNTY for any other default by the SUBRECIPIENT.

Section 13. Equal Opportunity; Non-Discrimination

SUBRECIPIENT shall comply with the requirements of all applicable federal, state and local laws, rules, regulations, ordinances and executive orders prohibiting and/or relating to discrimination, as amended and supplemented. All of the aforementioned laws, rules, regulations, and executive orders are incorporated herein by reference.

Section 14. Governing Laws; Venue

This Agreement and terms and conditions shall be governed by the laws, rules, and regulations of the State of Florida, and venue shall be in Lee County, Florida.

Section 15. Public Records Law

This Agreement, including attachments, is subject to disclosure under Florida's public records law subject to limited applicable exemptions. SUBRECIPIENT acknowledges, understands, and agrees that, except as noted below, all information in its application and attachments will be disclosed, without any notice to SUBRECIPIENT, if a public records request is made for such information, and the COUNTY will not be liable to SUBRECIPIENT for such disclosure. Social security numbers are collected, maintained and reported by the COUNTY must comply with IRS 1099 reporting requirements and are exempt from public records pursuant to Florida Statutes §119.071.

If SUBRECIPIENT believes that information in the Agreement, including attachments, contains information that is confidential and exempt from disclosure, SUBRECIPIENT must include a general description of the information and provide reference to the Florida Statute or other law which exempts such designated information from disclosure in the event a public records request is made. The COUNTY does not warrant or guarantee that information designated by SUBRECIPIENT as exempt from disclosure is in fact exempt, and if the COUNTY disagrees, it will make such disclosures in accordance with its sole determination as to the applicable law.

IF THE SUBRECIPIENT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE SUBRECIPIENT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 239-533-2221, 2115 SECOND STREET, FORT MYERS, FL 33901, <http://www.leegov.com/publicrecords>.

Section 16. Independent Contractor

SUBRECIPIENT acknowledges that it is acting as an independent contractor and not as an agent, officer or employee of COUNTY. In no event shall any provision of this Agreement make COUNTY liable to any person or entity that contracts with or provides goods or services to SUBRECIPIENT in connection with this Agreement. There is no contractual relationship, either express or implied, between COUNTY or any political subdivision of the State of Florida and any person or entity supplying any work, labor, services, goods or materials to SUBRECIPIENT as a result of this Agreement.

Section 17. Compliance with Applicable Laws

SUBRECIPIENT shall comply with the requirements of all applicable federal, state and local laws and the rules and regulations promulgated thereunder, including, but not limited to, Florida's Public Records Act, Chapter 119, Florida Statutes and specifically including, but not limited to ARPA.

Section 18. Notice

Any notice delivered with respect to this Agreement must be in writing and will be deemed to be delivered (whether or not actually received) when (1) hand delivered to the persons designated below, or (2) when deposited in the United States Mail, postage prepaid, certified mail, return-receipt requested, addressed to the person at the address for the party as set forth below, or such other or to such other person as the Party may have specified by written notice to the other Party delivered according to this Section:

As to COUNTY:

Roger Desjarlais
County Manager
PO Box 398
Fort Myers, FL 33902

As to SUBRECIPIENT:

YMCA of Southwest Florida, Inc.
Joey Belanger, District Executive Director
701 Center Road
Venice, FL 34285

Section 19. Risk Management

A. Hold Harmless and Indemnity Clause

To the fullest extent permitted by applicable law, SUBRECIPIENT shall protect, defend, indemnify, save and hold the COUNTY, the BoCC, its agents, officials, and employees harmless from and against any and all claims, demands, fines, loss or destruction of property, liabilities, damages, for claims based on the negligence, misconduct, or omissions of the SUBRECIPIENT resulting from the SUBRECIPIENT'S work as further described in this contract and its attachments, which may arise in favor of any person or persons resulting from the SUBRECIPIENT'S performance or non-performance of its obligations under this contract except any damages arising out of personal injury or property claims from third parties caused solely by the negligence, omission(s) or willful misconduct of the COUNTY, its officials, commissioners, employees or agents, subject to the limitations as set out in Florida general law, Section 768.28, Florida Statutes, as amended from time to time. Further, SUBRECIPIENT hereby agrees to indemnify the COUNTY for all reasonable expenses and attorney's fees incurred by or imposed upon the COUNTY in connection therewith for any loss, damage, injury, liability or other casualty. SUBRECIPIENT additionally agrees that the COUNTY may employ an attorney of the COUNTY's own selection to appear and defend any such action, on behalf of the COUNTY, at the

expense of the SUBRECIPIENT. The SUBRECIPIENT further agrees to pay all reasonable expenses and attorney's fees incurred by the COUNTY in establishing the right to indemnity.

The SUBRECIPIENT further agrees that it is responsible for any and all claims arising from the hiring of individuals relating to activities provided under the contract. All individuals hired are employees of the SUBRECIPIENT and not of the COUNTY.

B. Insurance Requirements

Insurance – Nonprofit SUBRECIPIENTS

The SUBRECIPIENT agrees to secure and maintain the insurance coverage outlined below during the term of this contract. The SUBRECIPIENT agrees that this insurance requirement shall not relieve or limit SUBRECIPIENT'S liability and that the COUNTY does not in any way represent that the insurance required is sufficient or adequate to protect the SUBRECIPIENT'S interests or liabilities, but are merely minimums. It is the responsibility of the SUBRECIPIENT to insure that all subcontractors comply with the insurance requirements.

Certificate(s) of Insurance *naming Lee Board of County Commissioners as Certificate Holder and additional insured* will be attached to this contract as an exhibit. Name and address for Certificate Holder should be: Lee Board of County Commissioners, P.O. Box 398, Fort Myers, FL 33902. Certificate(s) must be provided for the following coverage's at the time of contract execution and upon policy renewal. Renewal certificates are due to the COUNTY on or before expiration date.

1. Workers' Compensation– Statutory benefits as defined by Florida Statute 440 encompassing all operations contemplated by this contract or agreement to apply to all owners, officers, and employees. Employers' liability will have minimum limits of:
 - \$100,000 per accident
 - \$500,000 disease limit
 - \$100,000 disease limit per employee
2. Commercial General Liability – Coverage shall apply to premises and/or operations, products and/or completed operations, independent contractors, contractual liability, and broad form property damage exposures with minimum limits of:
 - \$500,000 bodily injury per person (B.I.)
 - \$1,000,000 bodily injury per occurrence (B.I.)
 - \$500,000 property damage (PD) or
 - \$1,000,000 combined single limit (C.S.L.) of B.I. and P.D.

The General Liability Policy Certificate shall name "Lee County, a political subdivision and Charter County of the State of Florida, its agents, employees, and public officials" as "Additional Insured". The SUBRECIPIENT agrees that the coverage granted to the Additional Insured applies on a primary basis, with the Additional Insured's coverage being excess.

3. Business Auto Liability – The following Automobile Liability will be required and coverage shall apply to all owned, hired, and non-owned vehicles used with minimum limits of:
\$100,000 bodily injury per person (B.I.)
\$300,000 bodily injury per occurrence (B.I.)
\$100,000 property damage (PD) or
\$300,000 combined single limit (C.S.L.) of B.I. and P.D.
4. Directors & Officers Liability – Entity coverage to cover claims against the organization directly for wrongful acts with limits not less than \$100,000.
5. Fidelity Bonding – Covering all employees who handle the agency's funds. The bond amount must be equivalent to the highest daily cash balance or a minimum amount of \$50,000.

Insurance – Government/Municipality

Documentation of the above coverage requirements are not applicable to government/municipalities that are self-insured.

Section 20. Disclaimer of Third Party Beneficiaries

This Agreement is made for the sole benefit of the Parties of this Agreement and their respective successors and assigns, and is not intended to and will not benefit any third party. No third party will have any rights under this Agreement, because of this Agreement or any right to enforce any provisions of this Agreement.

Section 21. Dispute Resolution

In the event of a dispute related to any performance or payment obligation arising under this Agreement, the Parties shall exhaust COUNTY administrative dispute resolution procedures prior to filing a lawsuit or otherwise pursuing legal remedies.

In the event that COUNTY administrative dispute resolution procedures are exhausted, either Party to this Agreement may notify the other Party in writing that it wishes to commence formal dispute resolution with respect to any unresolved problem under this Agreement. The Parties agree to submit the dispute to a Florida Certified Circuit Court Civil Mediator for mediation, within sixty (60) days following the date of this notice. In the event that any dispute cannot be resolved by mediation, the dispute may be filed as a civil action in the Circuit Court of the Twentieth Judicial Circuit of Florida, in and for Lee County, Florida, which is the sole venue for any such civil action.

Section 22. Assignment

This Agreement may not be assigned nor subcontracted in whole or in part without the prior written consent of the COUNTY.

Section 23. Headings

Article headings have been included in the Agreement solely for the purpose of convenience and shall not affect the interpretation of any of the terms of this Agreement.

Section 24. Survivability

Any term, condition, covenant or obligation which requires performance by either party subsequent to termination of this Agreement shall remain enforceable against such party subsequent to such termination.

Section 25. Modifications

This writing embodies the entire agreement and understanding between the parties hereto and there are no other agreements and/or understandings, oral or written, with respect to the subject matter hereof, that are not merged herein and superseded hereby. This Agreement may only be amended or extended by a written instrument executed by the COUNTY and the SUBRECIPIENT expressly for that purpose.

Section 26. Entire Agreement

It is understood and agreed that the entire agreement of the Parties is contained in this Agreement, which supersedes all oral agreements, negotiations, and previous agreements between the Parties relating to the subject matter of this Agreement.

Any alterations, amendments, deletions, or waivers of the provisions of this Agreement will be valid only when expressed in writing and duly signed by the Parties, except as otherwise specifically provided in this Agreement.

IN WITNESS WHEREOF, the SUBRECIPIENT and the COUNTY respectively, have caused this Agreement to be executed by their duly authorized representatives.

SUBRECIPIENT: YMCA OF SOUTHWEST FLORIDA, INC.

BY:

Signature

Date

Name (print)

ATTEST:

CLERK OF CIRCUIT COURT

BOARD OF COUNTY COMMISSIONERS

OF LEE COUNTY, FLORIDA

BY:_____

BY:_____

Chair

APPROVED AS TO FORM FOR THE
RELIANCE OF LEE COUNTY ONLY

County Attorney's Office

ATTACHMENT A: PROJECT DETAILS

Overview (Need and Response), Eligible activities.

Scope

The notice of funding availability included Section II. Scope of Grant Activities:

HVS encourages applicants to submit applications for projects, even if the project does not 'fit' perfectly into the descriptions here within. By submitting an application, the applicant is informing HVS of projects it intends or desires to develop to help meet an unmet need in the community and collaboratively work to reduce educational disparities in Lee County. HVS encourages creative applications that use technology, training, and data to expand programs and services in a sustainable manner.

Project Description

The project description was a response in Section 4 of the attached application.

Eligible Activities

A. Expense Category

Project(s) direct services must follow the restrictions from U.S Treasury rules and fit within the ARPA expense category: **2.25 Addressing Educational Disparities: Academic, Social, and Emotional Services**

B. Back-up Project Eligible Use Justification:

31 CFR 35.6(b)(3)(ii)(A)(4)

Responding to the negative economic impacts of the public health emergency for purposes including:

(A) Assistance to households and individuals, including:

(4) Programs to address the impacts of lost instructional time for students in kindergarten through twelfth grade;

ATTACHMENT B: SCOPE OF WORK

Description of the SUBRECIPIENT's and the COUNTY's task, deliverables, timelines, and milestones. Additional United States Treasury scope requirements may be identified and required after the execution of this agreement.

1. Task: Risk Assessment Questionnaire

All ARPA Subrecipients of Lee County are required to complete a subrecipient risk assessment questionnaire. The results will assist Lee County with subrecipient monitoring.

Deliverable: Completed Risk Assessment Questionnaire

2. Task: Project Planning

The project planning shall include an explanation of the plan components below. As necessary, copies of corresponding document for the components should be provided. Example: Provide a copy of the relevant policy and procedure.

NOTE: Much of this information was included with the funding application.

SUBRECIPIENT will provide updates to Lee County Human and Veteran Services if applicable.

Components:

- Provide an outline to document timelines for critical tasks associated with the project
 - *The activities outline was a response in Section 6 of the attached application.*
- Evidence-based Documentation;
 - *The evidence-based plan was a response in Section 5 of the attached application.*
- Equity-based Documentation;
 - *The equity-based plan was a response in Section 5 of the attached application.*
- Program Policy and Procedures;
 - *This program information may need to be provided to HVS staff.*
- Staffing Plan that includes a list of key staff, qualifications and special qualification requirements.
 - *The staffing plan was a response in Section 11 of the attached application.*

3. Task: Project Budget

The SUBRECIPIENT will maintain a Project Budget and Financial Accounting System. The SUBRECIPIENT will develop and maintain a project budget summary that shows annual and quarterly proposed obligated and actual expenses.

The original budget estimate was a response in Section 11 of the attached application.

Deliverables:

Annual and Quarterly Project Budget Updates; Contract Amendments as needed

4. Task: Reimbursement Requests

Due: Monthly by the 20th of the following month. All payments will be

reimbursement for eligible expenses/services defined as uncompensated expenses rendered during the contract term. Copies of supporting documentation is required as part of the Payment Request for review of grant compliance and before payment will be authorized by Human and Veterans Services.

Reimbursement for eligible expenses will be made after review and authorization of request and all required back up documentation. Appropriate back-up/supporting documentation may include: payroll reports, time cards, cancelled checks, vendor invoices, authorized purchase orders, attendance/service logs, other funder invoices, expenditure spreadsheets or other original documentation.

SUBRECIPIENTS are responsible for ensuring that any procurement using CSLFRF funds, or payments under procurement contracts using such funds are consistent with the procurement standards set forth in the Uniform Guidance at 2 CFR 200.317 through 2 CFR 200.327, and Appendix II to Part 200, as applicable. Proof of compliance must be included with back-up/supporting documentation.

The Payment Request must be submitted with an **authorized** signature. Cancelled checks, bank statements and/or other documentation from vendor that expense has been paid or service provided may be verified during monitoring.

Deliverables:

Payment reimbursement requests and supporting documents

5. Task: Project Monitoring

- a. The SUBRECIPIENT shall cooperate with the COUNTY's monitoring of the Grant project by making the necessary staff and project records available.
- b. The SUBRECIPIENT shall make the COUNTY aware of any project deemed at-risk of non-performance or non-compliance.
- c. When a project is deemed non-performing or incapable of expending its grant allocations as specified in its Subrecipient agreement, the SUBRECIPIENT may ask the COUNTY to repurpose the funds.

Deliverables:

Cooperation with monitoring

6. Task: Ensure Project Data Collection and Reporting

The SUBRECIPIENT will document its data collection and reporting methodology for the project. The SUBRECIPIENT will collect, compile, and report the project information in ATTACHMENT D to the COUNTY, including project performance, expenses, equity data, and learning data if applicable.

In addition, the COUNTY may ask the SUBRECIPIENT to collect other data as Treasury clarifies reporting and compliance requirements. The example required reports are listed in ATTACHMENT D – Reporting Requirements.

Deliverables:

SUBRECIPIENT'S Monthly Reports (Quarterly and Annual as required)

7. Task: Project Closeout

SUBRECIPIENT will comply with all closeout procedures of the awards, to include full compliance with the agreement terms and conditions, ARPA, CSLFRF rule and guidance, and 2 CFR 200. Key tasks will be closeout communications, confirmation for maintenance of records and financial documents, receipt of all final reimbursement requests or payment requests, receipt of all financial reports and performance reports, fulfillment of any requests to reconcile reports and payment requests.

Deliverables:

- Submittal of all performance and financial reports and records as required
- Plan for records retention

ATTACHMENT C: Project Budget and Expenses Worksheet

If a project cost overrun is identified or line item changes are needed, the SUBRECIPIENT must receive approval from the County before additional costs are incurred.

The budget was a response in Section 11 of the attached application.

ATTACHMENT D: REPORTING REQUIREMENTS (Example)

Below is an example of information that will be requested. There may be additional reporting requirements that the US Treasury requires or Lee County identifies during the project.

Items 1-3 were part of the response in Section 5 of the attached application. HVS will check in to see if there are any changes to the plan during the performance period.

1. Equity: Describe how you ensure that your program is designed and implemented with equity in mind for disproportionately affected populations. Additional Information – ATTACHMENT E: EQUITY-BASED REQUIREMENT
2. Community Engagement: Describe your communication, outreach, and engagement plan to make participants and the community aware of your project.
3. Evidence Based or Evidence Producing: If the project is an **evidence-based** practice, identify the source(s), the level of evidence, and explain how this project incorporates this principle.

If the project is an **evidence-producing** practice, identify related source(s) of your hypothesis and state your hypothesis clearly. Outline how evidence will be collected to validate that it presents as evidence-producing.

Additional Information – ATTACHMENT F: EVIDENCE-BASED REQUIREMENT
See Treasury's Compliance and Reporting Guidance State and Local Fiscal Recovery Fund,
<https://home.treasury.gov/system/files/136/SLFRF-Compliance-and-Reporting-Guidance.pdf>

4. Quarterly Reporting:

Schedule: Reporting due for SUBRECIPIENT.

Reporting Periods	Notes
Award Start Date – June 30, 2022	Due 15 working days after end of quarter
July 1, 2022 – September 30, 2022	
October 1, 2022 – December 31, 2022	
January 1, 2023 – March 31, 2023	
April 1, 2023 – June 30, 2023	
July 1, 2023 – September 30, 2023	
October 1, 2023 – December 31, 2023	
January 1, 2024 – March 31, 2024	
April 1, 2024 – June 30, 2024	
July 1, 2024 – September 30, 2024	
October 1, 2024 – December 31, 2024	
Close Out Report	Due January 15, 2025

A. Expenditure Summary

Reimbursement requests will detail expenditures. This project will report expenditures after reimbursement requests are approved and payment is distributed. Lee County will report project expenditures to US Treasury quarterly.

B. Disadvantaged Communities Summary (If applicable report quarterly)

How much of the grant has been expended to serve disadvantaged communities through program or service that is provided at a physical location in a Qualified Census Tract (for multi-site projects, if a majority of sites are within Qualified Census Tract);
How much of the grant has been expended to serve disadvantaged communities through program or service where the primary intended beneficiaries live within a Qualified Census Tract;
How much of the grant has been expended to serve disadvantaged communities through program or service for which the eligibility criteria are such that the primary intended beneficiaries earn less than 60 percent of the median income for the relevant jurisdiction (e.g., State, county, metropolitan area, or other jurisdiction); or
How much of the grant has been expended to serve disadvantaged communities through program or service for which the eligibility criteria are such that over 25 percent of intended beneficiaries are below the federal poverty line.

C. Performance Success Summary

<p>Project Status: Choice</p> <ul style="list-style-type: none"> • Not Started • Completed less than 50 percent • Completed 50 percent or more • Completed
<p>Provide a success story or summary of successes from this program that can be shared publicly. Always protect the privacy of beneficiaries.</p> <p>- This will be requested quarterly, but the SUBRECIPIENT only needs to share one story during the project.</p>
<p>Provide a report of key outputs for the past period [between ____ and ____].</p> <ol style="list-style-type: none"> 1) Number of students participating in after-school programming. Report quarterly participation. Report the cumulative participation number annually. Number of Students Served Goal Annually = 340 2) Number of students participating in summer programming. Report quarterly participation. Report the cumulative participation number annually. Number of Students Served Goal Annually = 555

<p>Provide a report of key outcomes for the past period [between ____ and ____].</p> <p>1) The number of students participating in evidence-based tutoring programs Maintain the goals set above for both after-school and summer programming. (Report annually)</p>
<p>Estimated Demographic Data: Treasury encourages recipients to provide data disaggregated by race, ethnicity, gender, income, and other relevant factors. Please supply data currently collected through existing registration process. Do not provide any personally identifying information.</p>

ATTACHMENT E: EQUITY-BASED REQUIREMENT (INFORMATIONAL)

Below is an example of information that will be requested. There may be additional reporting requirements that the US Treasury requires, or Lee County identifies during the project.

Equity: Describe how you ensure that your program is designed and implemented with equity in mind for disproportionately affected populations. Address the following:

- a. Goals: Are there particular historically underserved, marginalized, or adversely affected groups that you intend to serve within your jurisdiction?
- b. Awareness: How do you market the program to Lee County residents with equity in mind? How equal and practical is the ability for residents or businesses to become aware of the services funded by the SLFRF?
- c. Access and Distribution: Are there differences in levels of access to benefits and services across groups? Are there administrative requirements that result in disparities in ability to complete applications or meet eligibility criteria?
- d. Outcomes: Are intended outcomes focused on closing gaps, reaching universal levels of service, or disaggregating progress by race, ethnicity, and other equity dimensions where relevant for the policy objective?

ATTACHMENT F: EVIDENCE-BASED REQUIREMENTS (INFORMATIONAL)

SUBRECIPIENTS must briefly describe the goals of the project, and the evidence base for the interventions funded by the project.

- a) Demonstrate that the intervention is implemented as a program evaluation, see OMB M-20-12. "Recipients are exempt from reporting on evidence-based interventions in cases where a program evaluation is being conducted. Criteria requires the recipient to:

Required

- i. describe the evaluation design including whether it is a randomized or quasi experimental design;
- ii. state the key research questions being evaluated;
- iii. describe whether the study has sufficient statistical power to disaggregate outcomes by demographics;
- iv. post the evaluation publicly and link to the completed evaluation in the Recovery Plan;
- v. describe the timeframe for the completion of the evaluation (including a link to completed evaluation if relevant)
- vi. after sufficient evidence of efficacy has been provided, determine whether the spending for the evaluated interventions should be counted towards the dollar amount categorized as evidence-based for the relevant project
- vii. Recipient may be selected to participate in a nation evaluation which would study the project along with similar projects.

Encouraged

- viii. Consider how a Learning Agenda, either narrowly focused on SLFRF or broadly focused on the recipient's broader policy agenda, could support their overarching evaluation efforts in order to create an evidence-building strategy for their jurisdiction. See OMB M-19-23
- b) Strong Evidence-based interventions- Is the intervention, based on a "well-designed and well-implemented experimental studies conducted on the proposed program with positive findings on one or more intended outcomes".
- i. If yes, identify the program as "Strong Evidence Based", cite the study, summarize the findings, and provide the associations to the COUNTY program.
- c) Moderate evidence-based interventions – the intervention is based on one or more quasi-experimental studies with positive findings on one or more intended outcomes OR two or more non-experimental studies with positive findings on one or more intended outcomes.
- d) Preliminary evidence – the intervention is based on conclusions drawn from a non-experimental study which demonstrates improvement in program beneficiaries over time on one or more intended outcomes OR an implementation (process evaluation) study used to learn and improve program operations would constitute preliminary evidence. Examples of research that meet the standards include: (1) outcome studies that track program beneficiaries through a service pipeline and measure beneficiaries' responses at the end of the program. (2) pre- and post-test research that determines whether beneficiaries have improved on an intended outcome.

ATTACHMENT G: AGENCY NOFA APPLICATION

Application Attached below.

12. Completeness Checklist

<u>Application Forms and Attachments</u>	<u>Page #</u>
<u>Project Name:</u> Y Youth Success (YYS)	
<u>Project Applicant:</u> YMCA of Southwest Florida	
Table of Contents (COMPLETENESS CHECKLIST)	1
1. Applicant Information	2
2. Project Information	2-3
3. Certification	3
4. Project Description	4-8
5. Quality of Service Questionnaire	9-12
6. Ability to Complete Activities Outline	13-17
7. Budget Narrative	18-19
8. Budget Form	20-22
9. Performance Outcomes	23
10. Equity Outcomes	24
11. Required Attachments	
b. Applicants Annual Operating Budget	25
c. Chart of Key Project Staff	26
d. Documentation of Project's Alignment with Community Goals	27-28
e. Documentation of National Best Practices or Evidence Based Program design	29
g. Proof of 501c3 Status	30

SECTION V: Application Forms

All forms must be complete for application to be considered for conditional award.

1. Applicant Information

Organization Name: YMCA of Southwest Florida, Inc.	Authorized Organization Representative Name/Title: Gene T. Jones / President and CEO
Address: 701 Center Rd.	Telephone: (941) 492-9622
City, State/Zip: Venice, FL 34285	Organization Website: https://www.ymcaswfl.org/
Contact Person Name/Title: Joey Belanger District Executive Director	DUNS #: 080831258 UNIQUE ID: L7SYGQWJJR47
Contract Person E-mail: joeyb@ymcaswfl.org	Federal Employer ID #: 59-1629660

2. Project Information

Project Name: Y Youth Success (YYS)
Project Address <i>(if different from organization address)</i> : Corporate Address: 701 Center Rd., Venice, FL 34285 Local Lee County Addresses Bonita Springs YMCA: 27200 Kent Rd., Bonita Springs, FL 34135 Fort Myers YMCA: 1360 Royal Palm Square Blvd., Fort Myers, FL 33919
This is a/an: <input type="checkbox"/> New Project or <input checked="" type="checkbox"/> Expanded Project
Total Funding Requested for this Project: \$ <u>\$490,910.32</u>

Services Provided <i>(check the services that will be provided with the funding requested):</i>
<input checked="" type="checkbox"/> After School Programs <input type="checkbox"/> Employment Assistance and Job Training <input checked="" type="checkbox"/> Tutoring <input checked="" type="checkbox"/> Child Care <input type="checkbox"/> Transportation <input type="checkbox"/> Outreach Engagement <input type="checkbox"/> Life Skills <input type="checkbox"/> Assessment of Service Needs

Target Population (check as many as applicable below):	
<input type="checkbox"/> Children Ages 0 to 4 <input checked="" type="checkbox"/> Children Ages 5 to 9 <input checked="" type="checkbox"/> Children Ages 10 to 14 <input type="checkbox"/> Children Ages 15 to 18 <input type="checkbox"/> LGBTQI+ Individuals/Families/Youth <input type="checkbox"/> Other: _____	
Target Service Location (check as many as applicable below):	
<input checked="" type="checkbox"/> City of Cape Coral <input checked="" type="checkbox"/> City of Fort Myers <input checked="" type="checkbox"/> City of Bonita Springs <input type="checkbox"/> City of Sanibel	<input type="checkbox"/> Town of Fort Myers Beach <input checked="" type="checkbox"/> Unincorporated Lee County <input checked="" type="checkbox"/> All of Lee County <input checked="" type="checkbox"/> Other: Estero

3. Certification

To the best of my knowledge, I certify that the information in this application is true and correct and that the document has been duly authorized by the governing body of the applicant. I will comply with the program rules and regulations if assistance is approved. I also certify that I am aware that providing false information on the application can subject the individual signing such application to criminal sanctions. I further certify that I am authorized to submit this application and have followed all policies and procedures of my agency regarding grant application submissions.

Authorized Organization Representative:

Signature: _____

Typed Name: Gene T. Jones

Title: President & CEO Date: 4/29/22

4. Project Description

Scope and Demonstration of Need. YMCA of Southwest Florida (Y) will enhance and expand afterschool and summer programs in four targeted communities within Lee County to reduce educational disparities among elementary and middle school youth (ages five to 14). The proposed program - Y Youth Success (YYS) - includes afterschool and summer programs that will be offered in Bonita Springs/Estero, Lehigh Acres, Fort Myers, and Cape Coral. YYS will enhance educational programming with Power Scholars, an evidence-based reading and math program with proven results. Table 1 details the children and youth to be served in the targeted communities. The Y will use a combination of Y facilities, schools, and a church to serve 340 children and youth with afterschool programming and 555 children and youth with summer programming.

Table 1: Afterschool and Summer Program Sites in Targeted Communities

	Bonita Springs/Estero	Cape Coral	Fort Myers	Lehigh Acres
Afterschool programs with numbers served	Bonita Springs Y: 50 new , 50 total. Bonita Springs Recreation Center: 0 new , 60 total; Camp Estero: 30 new , 30 total		Six Mile Charter: 45 new , 45 total; Fort Myers Y: 0 new , 65 total; Fort Myers Middle Academy: 45 new , 45 total	Leigh Acres UMC: 45 new , 45 total
Summer programs with numbers served	Camp Estero: 10 new , 30 total; Bonita Springs Y: 20 new , 100 total. Bonita Springs Recreation Center: 20 new , 80 total; Three Oaks MS: 10 new , 40 total	Hector A Cafferatta ES: 80 new , 80 total	Fort Myers Y: 0 new , 65 total Cypress Lake MS: 0 new , 100 total	Leigh Acres UMC: 50 new , 50 total Leigh Acres MS: 60 new , 60 total

The Y programs are designed with intentional educational programming using research and evidence-based curriculum, training, and measurement tools from BellXcel (<https://www.bellxcel.org/>). Power Scholars, combined with the Y's high quality youth development programs, will offer proven opportunities to address educational disparities among the participants.

The YYS programs will target children and youth from the elementary and middle schools within each targeted community. Data from the Florida Department of Education and the School District of Lee County demonstrates that the students attending the schools within the targeted communities are in need of additional educational and youth development enrichment opportunities. Table 2 provides the schools within each targeted community that are feeders for the Y's afterschool and summer programs. This table also includes the percentages of minority students and English language learners (ELL) at each school. Table 2 also illustrates the academic achievement at each school by showing the percentage of students that scored a "3" or better on end of school year testing, indicating proficiency in English Language Arts (English LA) and Math. Please note that the state average for 3 or better for elementary school (ES) students is 52.8% for English LA and 48.4% for math; for middle school students the state average is 55.9% for English LA and 59.0% for math.

Table 2: School Data for Targeted Communities (2020-21 School Year)

Bonita Springs/Estero				
School Name	Minority %	ELL %	3+ English LA	3+ Math
Bonita Springs ES	92.5	54.7	45.4	62.3
Bonita Springs Charter (K-8)	45.8	11.2	41.0	49.1
Pinewoods ES	38.3	8.7	75.4	82.5
Spring Creek ES*	88.2	44.0	50.0	56.3
Three Oaks MS	43.7	6.5	62.1	64.9
Bonita Springs MS	74.7	21.3	54.5	68.2
Three Oaks ES	35.9	8.7	67.0	71.9
San Carlos ES*	64.4	22.2	50.1	46.1
Cape Coral				
School Name	Minority %	ELL %	3+ English LA	3+ Math
Caloosa ES	59.4	16.9	62.2	65.3
Cape ES	43.7	5.1	68.4	73.9
Diplomat ES	57.5	11.0	60.5	67.5
Gulf ES	42.0	6.4	65.0	70.6
Hector Cafferatta ES*	74.4	28.9	46.5	46.4
Patriot ES*	57.9	20.4	54.9	54.3
Trafalgar ES	51.2	11.6	62.8	67.6
Tropical Isles ES*	54.8	17.2	41.9	43.5
Fort Myers				
School Name	Minority %	ELL %	3+ English LA	3+ Math
Allen Park ES*	82.0	23.8	49.3	48.9
Colonial ES*	91.3	32.7	30.7	37.7
Edison Park ES	51.7	7.4	61.5	58.3
Heights ES	45.0	8.1	66.9	73.8
Orangewood ES*	78.4	19.6	46.6	53.4
Rayma C. Page ES	45.4	13.8	68.5	79.5

Tanglewood ES	49.1	13.7	63.6	64.8
Villas ES*	86.2	35.3	47.6	46.4
Cypress Lake MS	53.1	8.9	62.0	65.1
Lexington MS	60.1	11.5	54.7	56.9
PL Dunbar MS	74.9	11.5	52.6	53.4
Three Oaks MS	43.7	6.5	62.1	64.9
Six Mile Charter School	73.4	11.9	45.0	32.0
Lehigh Acres				
School Name	Minority %	ELL %	3+ English LA	3+ Math
G. Weaver Hipps ES*	87.2	26.9	36.6	38.5
Sunshine ES*	89.8	36.0	41.6	38.9
Lehigh ES*	84.3	27.3	39.0	41.1
Harns Marsh ES*	86.6	33.4	42.3	43.4
Tortuga Preserve ES*	82.1	23.1	46.2	43.9
Mirror Lakes ES*	83.8	26.2	46.2	48.9
Veterans Park Academy K-8*	83.1	14.0	45.0	41.1
Lehigh Acres MS*	84.1	12.7	36.8	34.5
Harns Marsh MS*	85.7	21.5	35.6	31.2
Varsity Lakes MS*	84.6	16.5	39.1	31.8

* Indicates school is classified as Title I with majority of economically disadvantaged students.

Data Source: <https://edudata.fldoe.org/>

The YYS afterschool and summer programs will be available to students from 36 schools in the county. Almost half of the schools are Title I schools that serve students from economically disadvantaged homes. Research related to student performance shows a high correlation between students from low income homes and lower school achievement. Fourteen of the schools have 20% or more of their students classified as English language learners. Students who are working to learn English also often struggle academically. When looking at the percentage of students at each school proficient in English Language Arts, 22 of the schools the Y will serve fall below the state average. Only one school had at least 75% of their students proficient in English Language Arts, meaning that at least 25% of the students and as many as nearly 70% were not proficient in Language Arts in the targeted communities' schools. The Math achievement is somewhat better with 12 schools below the state average. One school's Math achievement reached 82.5%, but 14 schools had less than 50% of their students proficient in Math. *Additionally, when comparing the students' achievement in the 2020-2021 school year to levels pre-COVID, every school scores in English Language Arts and Math have declined.*

During the school year, YYS will serve participants every day afterschool from school dismissal until 6:00 p.m. Some sites also have before school programming available. Afterschool programming provides academic enrichment and homework assistance, character development, structured outdoor activities for physical activities, healthy snacks, hand-on engaging indoor activities that include music and art, and fun. Staff at all Y sites complete background checks and receive training before and on an on-going basis. *The Y intends to add a*

new, evidence-based BellXcel Power Scholars program, a proven program for English Language Arts and Math that supports in-school learning as well as provides data on students' learning growth.

Summer programs are full-day, generally operating from as early as 7:30 a.m. to 6:00 p.m. to assist working parents. During the summer, YYS continues the programming including character development, structured outdoor activities for physical activities, healthy meals and snacks, hand-on engaging indoor activities that include music and art, and fun; and organizes weeks around themes such as “Ocean Commotion” and “Future Me”. Field trips, special guests, and speakers add to the rich experience. The BellXcel Power Scholars program will be continued into the summer programs allowing our participants to avoid summer learning loss and be fully prepared to excel in school when it begins in August.

Y afterschool and summer programs are fee-based; however, the Y offers scholarships based upon financial need and no one is turned away due to inability to pay. Weekly fees for afterschool average \$50 per participant and weekly fees for summer programs are \$150 per participant. All participants at YYS sites will use Power Scholars, there is no additional fee. Funding from Lee County will permit the Y to acquire the Power Scholars educational enrichment materials; a Grant Coordinator to oversee the program; laptops for staff use at each site and for the Coordinator; training for staff from BellXcel; evaluation tools to measure participant achievement; program supplies and a printer at each site; and feedback tools for participants, parents, and Y teaching staff. The participants' materials are engaging, culturally appropriate, and grade-based. The afterschool materials are “magazine-style” with materials for a math and English language arts of about 30 minutes each. Summer materials are similar; however the materials provide a 60-90 minute lesson for each math and English language arts. The Y will have teachers and trained “tutors” delivering the programs at every site.

Follow Evidence-based Approach.

All Y programs, including afterschool and summer, follow guidelines that have been developed to ensure quality experiences for participants. Programs are carefully planned and staffed by trained individuals. Regular reviews are conducted by Y professional staff to ensure that the programs are maintaining fidelity to quality standards. Parents of the programs' participants are surveyed annually for satisfaction and programs meeting expectations.

The BellXcel Power Scholars program has a robust evidence base for afterschool and summer program use. Their website lists multiple reputable studies that confirm its effectiveness in improving academic achievement and reducing educational disparities.¹

YYS will include intentional educational activities and experience to help to mitigate educational disparities. If parents elect the Power Scholar service, children will participate in the program that will be delivered by trained staff. The Y Program Director and Executive staff will

¹ <https://www.bellxcel.org/education-research-and-insights/>

continually monitor the results of the Power Scholars program to ensure that participants are making progress and that the program is delivered with fidelity.

Service Coordination.

One of the Y's cornerstones is Social Responsibility. The Y has built a robust network of internal and external resources to assist Y families and the general community. We have developed "Cause Champions" – community leaders that help to build collaborative partnerships to meet emerging needs, address critical social issues, and serve others without barriers.

YMCA of Southwest Florida believes we are stronger when we work together to address critical community needs and partners with other organizations to ensure that everyone has access to programs that allow individuals to thrive. We utilize our internal and external resources partnerships and Cause Champions to respond to the needs of the families of the children and youth in the afterschool and summer programs.

Project's Role in Addressing Educational Disparities.

The YYS afterschool and summer program expansion and enhancement are a direct response to the need of the targeted communities to address educational disparities among elementary and middle school. Research has documented that afterschool and summer programs have positive effects on educational outcomes and in social emotional growth. *The Y will deliver high quality afterschool and summer programs with emphasis on academic enrichment through the addition of the evidence-based Power Scholars program to participants who are likely to have suffered from a gap in their learning due to lost school days and the emotional upheaval due to the COVID pandemic.*

5. Quality of Services

A. Innovation, Best-Practices, and Designed with Existing Evidence-Based Program.

The Y's afterschool and summer programs will incorporate an innovative and engaging tool from BellXcel. The evidence-based program, Power Scholars, has demonstrated proven impact with improving student academic success and meets federal and state standards. Y staff will manage the learning platform that is delivered to each participant. Power Scholars includes training, professional development, and coaching for our staff to ensure the program is utilized effectively and with fidelity. In addition to academic enrichment, Power Scholars' is flexible and can incorporate social emotional learning and wellness in addition to academics.

The core afterschool and summer programs follow standards from the YMCA of the USA's national best practices. As an association of the national YMCA, the YMCA of Southwest Florida ensures our staff attends local and national training in youth development that includes afterschool and summer programming. Our afterschool programs also meet the State of Florida Department of Children and Families standards.

The benefits of afterschool programming have been established by the research that the Y uses in its program. The most recent and thorough documentation for the benefits of afterschool programs for improving academic achievement, attendance, physical fitness, and other areas is from Research for Action.² Their publication established the evidence-based model design that the Y will incorporate which includes regular high quality academic enrichment during the afterschool time. The Power Scholars program is developed with this same framework and will add to the impact of the Y's afterschool program.

Summer learning loss, often called summer slide, refers to the loss of previous learning that students have during the summer. Research has shown that summer learning loss disproportionately impacts struggling and low-income students. It has been documented that struggling and low-income elementary school students lose two-three months of learning over the summer. By the end of the fifth grade, these students have lost an entire academic year of learning and many never recover. Multiple studies have documented the benefits of academic enrichment during the summer for all students, but especially for students who are struggling and/or low-income.³ A recent study from the Annenberg Institute at Brown University presents evidence that summer learning loss is the driver of academic disparities.⁴ Last of all, the

² Neild, R.C., Wilson, S.J., & McClanahan, W. (2019). Afterschool programs: A review of evidence under the Every Student Succeeds Act. Philadelphia: Research for Action.

<https://www.researchforaction.org/projects/afterschoolessa/>

³ <https://www.brookings.edu/research/summer-learning-loss-what-is-it-and-what-can-we-do-about-it/>

⁴ Atteberry, Allison, and Andrew McEachin. (2019). School's Out: The Role of Summers in Understanding Achievement Disparities.

Wallace Foundation's publication, "Every Summer Counts" provides longitudinal evidence of the benefits of summer learning programs.⁵

The Y's summer program will also utilize the evidence-based Power Scholars program. Daily schedules will incorporate the Power Scholars component and present it as a fun and engaging learning tool.

B. Engage and Gather Feedback.

The Y uses regular surveys of the parents of the participants in our programs to gather feedback that is used to address concerns and make program improvements. The Y welcomes parents in program celebrations, participant performance and in program orientations. The Y's philosophy is to serve the family and build strong relationships and community. The Power Scholars program also has a new tool that the Y will be able to use for parent engagement and feedback. Parents will be able to provide anonymous feedback on their child's academic progress and feedback regarding Power Scholars. The participants will also be able to evaluate the Power Scholars program through regular on-line surveys. The Y will use all these avenues to assess and improve our programs.

C. Program Marketing.

The Y has designed the YYS afterschool and summer programs to be in targeted communities with need for educational enrichment to address disparities. Our programs will be marketed in English and in Spanish in the schools that have been mentioned. Our staff will attend school open-houses and events to reach out to families with need. We will also ask our school contacts to help identify students for our programs. The Y is known as a trusted partner in these communities, and we do not anticipate any problems reaching our program capacity at each site and ensuring that those families and children with need will be among our participants.

D. Assessing Participants' Needs and Making Referrals.

Every participant in the Y's afterschool and summer program completes a registration form. To better serve the participants in the proposed programs, the Y will add a section to the registration form that asks the parent to check items that they have needs for that include internal Y resources such as health and wellness programming or for external resources such as food, school supplies, or medical assistance. The Y Program Director will meet with each parent requesting assistance and link them to either internal Y resources or to other community-based resources.

E. Experience Providing Services to Children And Families, Including Federal, State, and/or Local Government Grant Experience, Organization Capacity to Administer Project and Oversee All Compliance Requirements.

YMCA of Southwest Florida has been providing services to children and families for more than 50 years. In 2011, the Fort Myers YMCA joined YMCA of Southwest Florida and in 2012, the

⁵ <https://www.wallacefoundation.org/knowledge-center/Documents/Every-Summer-Counts-A-Longitudinal-Analysis-of-Outcomes-from-the-National-Summer-Learning-Project.pdf>

Bonita Springs YMCA also joined. Most recently, in 2020 the Villages of Estero entered into an agreement for the YMCA to run The Happehatchee Center, which has become Camp Estero. During the devastating effects of COVID-19, the Y quickly mobilized to provide essential services in the community. The Y provided emergency childcare for essential workers, opened virtual learning centers for children when schools closed, reached out to our members and seniors for wellness checks, and expanded food programs for anyone hungry. The Y is a leader in serving children, families, and communities.

The Y has extensive experience with local, state, and federal grants. We operate charter schools, licensed high-quality early learning academies centers, health innovation programs including Parkinson's Wellness Programs, Livestrong at the YMCA, and Enhanced Fitness. We have the administrative, financial, and programmatic systems in place to implement the proposed afterschool and summer programs that will have positive results for participants with educational disparities. Our staff has regular program reviews to assess compliance and quality of service and uses the review data to make necessary program improvements.

F. Remove Traditional Barriers to Education for Children and Families.

The Y has a history of serving all children and families in the community. Our doors and services are open to all. The Y provides services in our facilities and in community locations. We actively partner with other organizations to bring forward solutions. During the COVID period when schools were closed and virtual learning was implemented, the Y opened our doors to children and families to use our technology to maintain their academic connection. For example, in this proposal, the afterschool and summer services will be offered in Y facilities and in schools – public and charter, a recreation center, and at a local church.

G. Internal Annual Evaluation.

The Board of Directors annually evaluates the CEO. The CEO receives a written performance review conducted by the Board of Directors. Our organization also has an annual independent audit.

Summer Camp:

- Quality Checklist and Program Assessments conducted by association youth development staff.
- Parent surveys are conducted every week as well as an end of the summer survey.
- Surveys provide feedback about program and staff quality and overall satisfaction.

Afterschool:

- Quality Checklist and Program Assessments conducted by association youth development staff.
- Parent surveys are conducted at least once per school year.
- Surveys provide feedback about program and staff quality and overall satisfaction.

The Y staff uses survey information to assess program quality components and make indicated quality improvements.

H. Sustaining the Quality Services After the Grant Term.

YMCA of Southwest Florida will utilize many strategies to continue the proposed program. We will continue to search out and secure new grant funding for the program. We believe the results of the Power Scholars program will assist us in demonstrating the program's success and need for renewed funding. In addition, the Y operates an Annual Campaign to raise funds for scholarships and programmatic operations for programs such as this that serve our communities.

6. Ability to Complete Activities Outline

Timeline of Critical Tasks

Dates	Key Activities	Responsible Staff	Milestones
June 2022 (based upon projected dates that Y has been selected for funding)	Post Grant Coordinator Job Description	Y HR Department	Identify potential candidates for positions, contingent on contract execution.
July 1, 2022	Lee County BellXcel Power Scholars contract is fully executed	Y President and CEO	Contract is signed by Y official and activities may begin.
July 1-31, 2022	Staff selected, formally hired and trained for YYS and Power Scholars	YYS Lead staff, B. Nason, SVP Youth Development, J. Belanger, ED Lee County, A. Cerritos, ED Bonita Springs	New part-time staff is hired, attend mandatory Y orientation and trained in Y youth development practices, afterschool procedures. All staff (new and returning) complete Power Scholars training, implementation, and data collection.
July 15-31, 2022	Program materials ordered and delivered at all sites	YYS Lead staff or designees	Program sites prepared for youth participants.
July 1-July 31, 2022 (recruitment continues until sites are fully enrolled)	Recruit program participants	YYS Lead staff or designees	Youth are registered for YYS at all sites
Early August (prior to school starting)	Parent orientation	YYS Lead staff or designees	Parents of program participants are provided YYS orientation, expectations for youth in programs, contact information for each program site.
August 10, 2022	Newly recruited program participants	Y Leadership and YYS Lead staff	Staff recruited, hired and trained and in positions at program sites, participants

	begin to attend programs at all sites		enrolled at site, afterschool program begins.
August – December 2022	Program operates weekdays	YYS Lead staff or designees	Fully operational program in place with Power Scholars.
August – December 2022	Staff meetings and program review at least twice each month	YYS Lead staff or designees	Contract requirements are continually reviewed for compliance; programs are improved based on best practices, parent and youth feedback. Quarterly reporting provided per contract.
January 2023 – May 2023	Afterschool program continues	YYS Lead staff or designees	Fully operational program is in place with Power Scholars.
January 2023 – May 2023	Staff meetings and program review at least twice each month	YYS Lead staff or designees	Contract requirements are continually reviewed for compliance; programs are improved based on best practices, parent and youth feedback. Quarterly reporting provided per contract.
April-May 2023	Summer program planning	YYS Lead staff or designees	Full-day summer program planned with Power Scholars, guest speakers, special events, food delivery, field trip / transportation arranged, supplies as needed secured. Additional staff recruited, hired, and trained.
June – early August 2023	Full day summer program operates	YYS Lead staff or designees	Full-day summer programming occurs incorporating intentional learning activities with Power Scholars
June – early August 2023	Staff meetings and program review at least twice each month	YYS Lead staff or designees	Contract requirements are continually reviewed for compliance; programs are improved based on best practices, parent and youth feedback. Quarterly reporting provided per contract.

Mid – July through Early August 2023	Program planning for transition back to afterschool	YYS Lead staff or designees	Program continues at all sites with summer schedule while planning for afterschool is underway including hiring necessary staff, participant recruitment, site preparation.
August 2023 – May 2024	Afterschool Program continues at all sites	YYS Lead staff or designees	Fully operational program in place with Power Scholars.
August 2023 – May 2024	Staff meetings and program review at least twice each month	YYS Lead staff or designees	Contract requirements are continually reviewed for compliance; programs are improved based on best practices, parent and youth feedback. Quarterly reporting provided per contract.
June 2024 – August 2024	Full-day Summer programming	YYS Lead staff or designees	Full-day summer programming occurs incorporating intentional learning activities with Power Scholars.
June 2024 – August 2024	Staff meetings and program review at least twice each month	YYS Lead staff or designees	Contract requirements are continually reviewed for compliance; programs are improved based on best practices, parent and youth feedback. Quarterly reporting provided per contract.
August 2024 – December 2024	Afterschool Program continues at all sites	YYS Lead staff or designees	Fully operational program in place with Power Scholars.
August 2024 – December 2024	Staff meetings and program review at least twice each month	YYS Lead staff or designees	Contract requirements are continually reviewed for compliance; programs are improved based on best practices, parent and youth feedback. Quarterly reporting provided per contract.
January 2024 - September 2024	Develop and implement sustainability plan	Y Leadership and YYS Lead Staff	Sustainability plan developed and planned for implemented in January 2025 to continue YYS. Includes new grants,

			reapplication to Lee County (if available), fundraising/special events, and other activities.
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Monthly Spending Plans and Proposed Draw Down Schedule

The Y anticipates the following spending plan with the monthly requested reimbursement as shown.

Spending Plan

Period: June 1, 2022 - December 21, 2022

June: \$0
 July: \$18,801.28
 August: \$41,501.28
 Sept: \$8,360.38
 October: \$5,801.28
 November: \$5,801.28
 December: \$5,801.28

Period: January 1, 2023 - December 31, 2023

January: \$8,557.33
 February: \$6,057.33
 March: \$8,801.62
 April: \$6,057.33
 May: \$19,307.33
 June: \$78,027.55
 July: \$6,057.33
 August: \$47,001.62
 Sept: \$6,057.33
 October: \$6,057.33
 November: \$6,057.33
 December: \$6,057.33

Period: January 1, 2024 - December 31, 2024

January: \$8,936.83
 February: \$9,253.02
 March: \$6,436.83
 April: \$6,436.83
 May: \$13,436.83
 June: \$78,586.83
 July: \$6,436.83
 August: \$47,453.02
 Sept: \$6,436.83
 October: \$6,436.83
 November: \$6,436.83
 December: \$6,436.83

Reporting Schedule for Outcomes

The Y proposed the following outcome reporting for YYS program documentation.

Monthly Reporting

- Youth Enrolled per site
- Youth Attendance by site

Quarterly Reporting

- Power Scholar Student Achievement Reports – individual students will not be identified (to coincide with school 9-week blocks and end of summer period)
- Parent Survey (once per school semester and once during summer) with summary of comments and quality improvements implemented.

Annual Reporting

- 98% of children and youth participating in the YYS utilizing Power Scholars will have on-time promotion to the next grade level.
- 85% of children and youth participating in the YYS afterschool program utilizing Power Scholars at least 3 days per week will show an increase in achievement in math and English language arts score from pre to post test.
- 85% of children and youth participating in the YYS summer program utilizing Power Scholars at least 3 days per week will show an increase in achievement in math and English language arts score from pre to post test.
- 90% of parents of YYS participants will rate the Power Scholars program as above average or better.

*BASE=After School Program	Total Expenses	\$ 86,066.78
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Grand Total	\$ 493,067.73
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Total Expenses	\$ 204,276.56
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Total Expenses	\$ 202,724.39
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Spending Plan

June 1, 2022 - December 31, 2022

Month	Staffing	Power Scholars	Equipment	Administrative	Total
June					\$ -
July	\$ 5,118.21		\$ 13,000.00	\$ 683.07	\$ 18,801.28
August	\$ 5,118.21	\$ 35,700.00		\$ 683.07	\$ 41,501.28
September	\$ 7,677.31			\$ 683.07	\$ 8,360.38
October	\$ 5,118.21			\$ 683.07	\$ 5,801.28
November	\$ 5,118.21			\$ 683.07	\$ 5,801.28
December	\$ 5,118.21			\$ 683.07	\$ 5,801.28
Total	\$ 33,268.36	\$ 35,700.00	\$ 13,000.00	\$ 4,098.42	\$ 86,066.78

January 1, 2023 - December 31, 2023

Month	Staffing	Power Scholars	Equipment	Administrative	Total
January	\$ 5,488.58		\$ 2,500.00	\$ 568.75	\$ 8,557.33
February	\$ 5,488.58			\$ 568.75	\$ 6,057.33
March	\$ 8,232.87			\$ 568.75	\$ 8,801.62
April	\$ 5,488.58			\$ 568.75	\$ 6,057.33
May	\$ 5,488.58		\$ 13,250.00	\$ 568.75	\$ 19,307.33
June	\$ 5,488.58	\$ 72,150.00		\$ 568.75	\$ 78,207.33
July	\$ 5,488.58			\$ 568.75	\$ 6,057.33
August	\$ 8,232.87	\$ 35,700.00	\$ 2,500.00	\$ 568.75	\$ 47,001.62
September	\$ 5,488.58			\$ 568.75	\$ 6,057.33
October	\$ 5,488.58			\$ 568.75	\$ 6,057.33
November	\$ 5,488.58			\$ 568.75	\$ 6,057.33
December	\$ 5,488.58			\$ 568.75	\$ 6,057.33
Total	\$ 71,351.56	\$ 107,850.00	\$ 18,250.00	\$ 6,825.00	\$ 204,276.56

January 1, 2024 - December 31, 2024

Month	Staffing	Power Scholars	Equipment	Administrative	Total
January	\$ 5,632.37		\$ 2,500.00	\$ 804.46	\$ 8,936.83
February	\$ 8,448.56			\$ 804.46	\$ 9,253.02
March	\$ 5,632.37			\$ 804.46	\$ 6,436.83
April	\$ 5,632.37			\$ 804.46	\$ 6,436.83
May	\$ 5,632.37		\$ 7,000.00	\$ 804.46	\$ 13,436.83
June	\$ 5,632.37	\$ 72,150.00		\$ 804.46	\$ 78,586.83
July	\$ 5,632.37			\$ 804.46	\$ 6,436.83
August	\$ 8,448.56	\$ 35,700.00	\$ 2,500.00	\$ 804.46	\$ 47,453.02
September	\$ 5,632.37			\$ 804.46	\$ 6,436.83
October	\$ 5,632.37			\$ 804.46	\$ 6,436.83
November	\$ 5,632.37			\$ 804.46	\$ 6,436.83
December	\$ 5,632.37			\$ 804.46	\$ 6,436.83
Total	\$ 73,220.85	\$ 107,850.00	\$ 12,000.00	\$ 9,653.54	\$ 202,724.39

Grand Total	\$ 177,840.77	\$ 251,400.00	\$ 43,250.00	\$ 20,576.96	\$ 493,067.73
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Budget Template

Notice of Funding Availability #ARP3.3ED

Complete ONLY BLUE fields. Do not edit grey fields.

Year 1 (June 1, 2022 - December 31, 2022)		
Eligible Costs	Quantity AND Description (max 400 characters)	Annual Assistance Requested
1. Staff Costs (separate quantity and description for each position)	Grant Coordinator (1)	\$ 27,497.60
	Payroll Taxes	\$ 2,749.76
	Benefits	\$ 1,500.00
2. Supplies and Equipment (I.E. Computers, hardware, phones, furnishings, etc.) (separate quantity and description for each item)	Laptops (8)	\$ 6,000.00
	Printers (7)	\$ 3,500.00
	Program Supplies (7)	\$ 3,500.00
	Power Scholars Program (340)	\$ 35,700.00
3. Other software (i.e. Zoom, financial management, etc.) (separate quantity and description for each item)		
4. Program and Operating Expenses (Costs associated with the provision of services. Including, but not limited to building lease, computer and telephone services, vehicle costs, etc.)	Staff Mileage (100 per week x .0585)	\$ 1,521.00
5. Training and Technical Assistance (separate quantity and description for each item)		
6. Administrative Expenses - Max of 5% of total project request (i.e. A portion of CEO staff salary, contract or accounting staff, payment to consultant for accounting or payroll services) (separate quantity and description for each item)	District Exec Salary	\$ 1,024.60
	Exec Salary	\$ 1,024.60
	Program Director Salary (2)	\$ 2,049.21
7. Other		
8. Other		
Subtotal Requested		\$ 81,968.36
Admin Requested (max of 5%)		\$ 4,098.42
Total Amount Requested Year 1 (2022)		\$ 86,066.78

Year 2 (January 1, 2023 - December 31, 2023)		
Eligible Costs	Quantity AND Description (max 400 characters)	Annual Assistance Requested
1. Staff Costs (separate quantity and description for each position)	Grant Coordinator - Salary (1)	\$ 56,645.06
	Payroll Taxes	\$ 5,664.51
	Benefits	\$ 6,000.00
2. Supplies and Equipment (I.E. Computers, hardware, phones, furnishings, etc.) (separate quantity and description for each item)	Laptops (8)	\$ 3,750.00
	Printers (7)	\$ 2,500.00
	Program Supplies (12)	\$ 12,000.00
	Power Scholars Program (895)	\$ 107,850.00
3. Other software (i.e. Zoom, financial management, etc.) (separate quantity and description for each item)		
4. Program and Operating Expenses (Costs associated with the provision of services. Including, but not limited to building lease, computer and telephone services, vehicle costs, etc.)	Staff Mileage (100 per week x .0585)	\$ 3,042.00
5. Training and Technical Assistance (separate quantity and description for each item)		
6. Administrative Expenses - Max of 5% of total project request (i.e. A portion of CEO staff salary, contract or accounting staff, payment to consultant for accounting or payroll services) (separate quantity and description for each item)	District Exec Salary	\$ 1,706.25
	Exec Salary	\$ 1,706.25
	Program Director Salary (2)	\$ 3,412.50
7. Other		
8. Other		
Subtotal Requested		\$ 197,451.57
Admin Requested (max of 5%)		\$ 6,825.00
Total Amount Requested Year 2 (2023)		\$ 204,276.57

Year 3 (January 1, 2024 - December 31, 2024)		
Eligible Costs	Quantity AND Description (max 400 characters)	Annual Assistance Requested
1. Staff Costs (separate quantity and description for each position)	Grant Coordinator - Salary (1)	\$ 58,344.41
	Payroll Taxes	\$ 5,834.44
	Benefits	\$ 6,000.00
2. Supplies and Equipment (I.E. Computers, hardware, phones, furnishings, etc.) (separate quantity and description for each item)	Program Supplies (12)	\$ 12,000.00
	Power Scholars Program (895)	\$ 107,850.00
3. Other software (i.e. Zoom, financial management, etc.) (separate quantity and description for each item)		
4. Program and Operating Expenses (Costs associated with the provision of services. Including, but not limited to building lease, computer and telephone services, vehicle costs, etc.)	Staff Mileage (100 per week x .0585)	\$ 3,042.00
5. Training and Technical Assistance (separate quantity and description for each item)		
6. Administrative Expenses - Max of 5% of total project request (i.e. A portion of CEO staff salary, contract or accounting staff, payment to consultant for accounting or payroll services) (separate quantity and description for each item)	District Exec Salary	\$ 2,413.39
	Exec Salary	\$ 2,413.39
	Program Director Salary (2)	\$ 4,826.77
7. Other		
8. Other		
Subtotal Requested		\$ 193,070.85
Admin Requested (max of 5%)		\$ 9,653.54
Total Amount Requested Year 3 (2024)		\$ 202,724.39

9. Performance Outcomes

Mark Selected Outcome(s)	Performance Measure	Describe the how the outcome will be achieved and how data will be tracked to measure progress toward the outcome.
X	Number of students participating in evidence-based tutoring programs.	The YYS program will serve 340 children and youth with afterschool programming and 555 children and youth with summer programming that provides educational enrichment through the evidence-based Power Scholars program.
	75% of youth who complete the program will show an increase in 21st-century skills such as communication, teamwork, social skills, self-confidence, and analytical thinking.	
	65% of students who complete the program will demonstrate grade-level reading ability.	
	80% of students not on track to graduate will graduate high school	
	65% of students not planning on going to college or vo-tech, will be accepted into college or vo-tech school.	
	55% of students enrolled in the program will graduate from high school with a plan to work or attend college	
	55% of participants will complete further education (college, technical school, or certificate program) after completion of program.	
	85% of participants will increase their digital literacy	
	70% of youth who complete the program will increase their skill level in Reading, Language Arts, Math, or Science.	
	85% of youth who participate in at least 30 minutes of physical fitness activity will increase their physical fitness skills.	
	90% of participating youth will learn healthy behaviors as demonstrated by not becoming pregnant or fathering a child	
	45% of participants who are not involved in extracurricular activities will join upon completion of the program.	
	80% of clients who complete the program will be able to improve soft skills. (communication, critical thinking, life skills)	
	80% of clients who complete the program will be able to complete activities of daily living.	
	Other, please specify:	

Section 10: Equity Outcomes

1. Describe how your project prioritizes economic and racial equity as a goal.

YMCA of Southwest Florida's "Y Youth Success" (YYS) is an afterschool and summer youth development program that has intentionally been designed to reach children, youth, and families from economically and racially/ethnically diverse communities in Lee County with evidence-based educational components to mitigate learning disparities.

2. Name specific targets intended to produce meaningful equity results, and articulate the strategies to achieve those targets.

YYS has been structured to provide services to children, youth and their families who are attending racially and ethnically diverse elementary and middle school as well as a selection of Title I schools to ensure children and youth from all backgrounds and communities can participate in high-quality experiences.

3. Explain how your agencies overall equity strategy translates into the specific services or programs offered by your agency in the following Expenditure Categories (answer all that apply):

a. services to address health disparities and the social determinants of health,

YYS does address educational disparities that are one of the social determinants of health.

b. build stronger neighborhoods and communities (e.g., affordable housing),

Does not apply

c. address educational disparities (e.g., evidence-based tutoring, community schools, and academic, social-emotional, and mentalhealth supports for high poverty schools),

The YYS program focuses on the educational disparities among children youth, and families of color by intentionally targeting services for them. YYS will provide high-quality, evidence-based strategies designed to improve educational achievement.

d. and promote healthy childhood environments (e.g., home visiting, child care).

YYS provides elementary/middle school children and youth with adult-led, safe, enriching programs afterschool and during the summer months that permit working parents to secure and maintain employment.

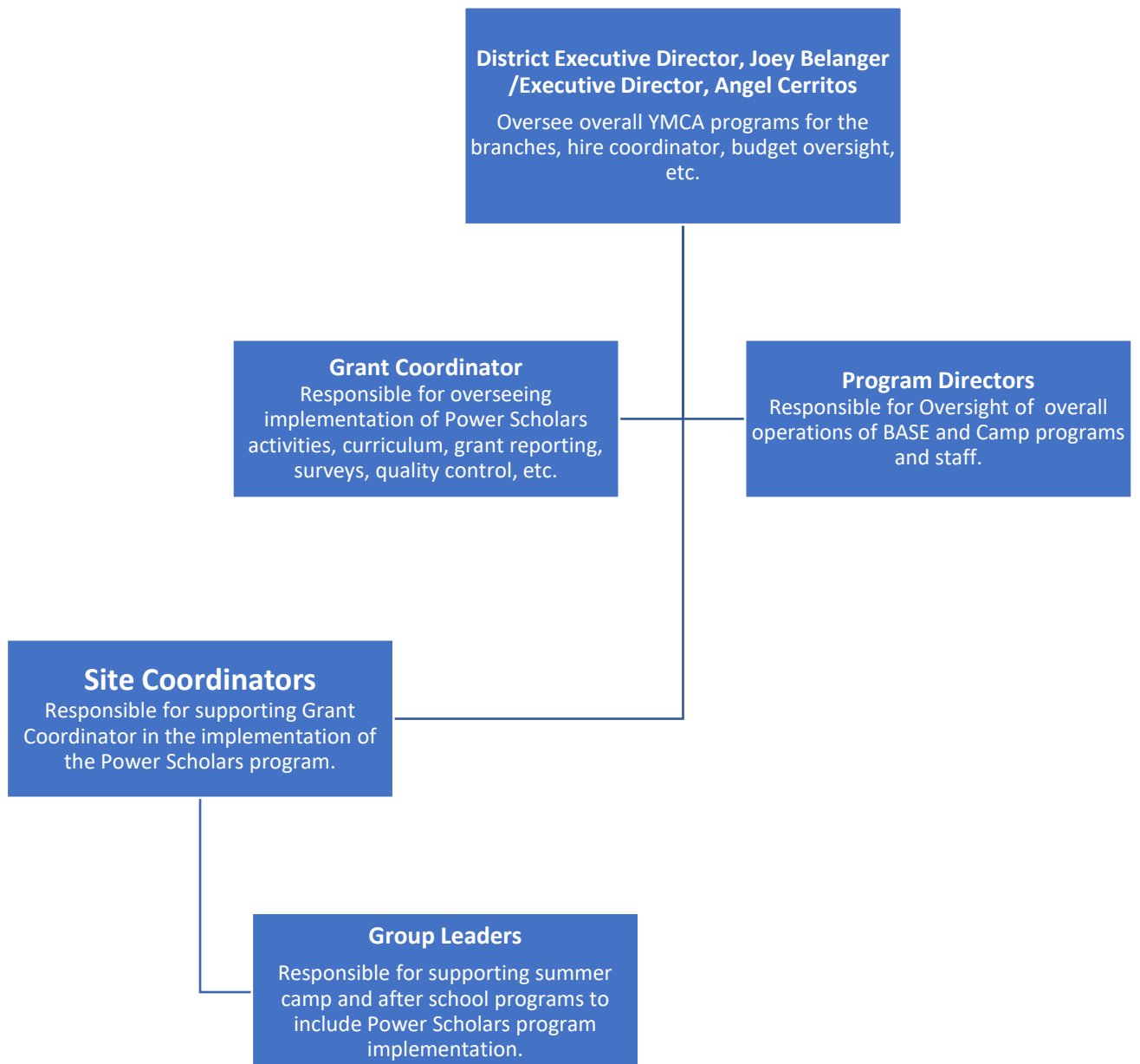
4. Are intended outcomes focused on closing gaps, reaching universal levels of service, or disaggregating progress by race, ethnicity, and other equity dimensions where relevant for the policy objective?

The YYS program is focused on closing educational gaps for all struggling students in the program with an emphasis of reaching low-to-moderate income families and/or families of color.

YMCA of Southwest Florida Inc.	
Unrestricted	
Revenue from Direct Contributions	\$ 905,900
Donated Goods and Services Revenue	\$ 18,500
Revenue from Non-government Grants	\$ 1,678,944
Revenue from Indirect Contributions (UW)	\$ 232,545
Revenue from Government Grants	\$ 2,373,133
Revenue from Government Agencies	\$ 6,480,891
Revenue from Program Fees	\$ 8,950,235
Revenue from Membership Fees	\$ 7,397,574
Revenue from Special Events	\$ 663,456
Revenue from Investments	\$ 13,500
Revenue from Other - Rents	\$ 695,362
Revenue from Other - Management Fees	\$ 331,104
Revenue from Other - Assoc Office Alloc	\$ 1,685,652
Revenue from Other Sources	\$ 330,865
Revenue Other - Investments G/L	\$ 267,000
Revenue	\$ 32,024,661
Salaries and Benefits	\$ 17,165,605
Contract Services	\$ 1,697,470
Supplies	\$ 2,114,678
Office Administration Expenses	\$ 264,970
Financial Assistance to Individuals	\$ 893,272
Depreciation	\$ 1,940,720
Facility & Equipment Expense	\$ 2,719,728
Travel & Meeting Expenses	\$ 310,605
All Other Expenses - Interest Expense	\$ 289,674
All Other Expenses - Prop & Liab Insurance	\$ 843,708
All Other Expenses - Association Dues	\$ 312,647
All Other Expenses - Advertising and Promotions	\$ 213,704
All Other Expenses - Assoc Office Allocation	\$ 1,685,654
All Other Expenses	\$ 1,096,411
Business Expenses	\$ -
Expense	\$ 31,548,845
Net Margin	\$ 475,816
Margin %	1.5%



Y Youth Success (YYS) Power Scholars Staff Chart



OUR AREAS OF FOCUS

We See Strength in our Community

The YMCA believes that everyone deserves a chance to succeed—no matter their background or income – and we have learned that can happen only when we unite to nurture the best in all of us. That is why our cause is strengthening community through youth development, healthy living and social responsibility.

- Expand program sites

- Serve more youth

- Increase quality survey scores

- Increase School test scores



YOUTH DEVELOPMENT

To meet the needs of our community and to develop the potential of every child



HEALTHY LIVING

To be a leader in providing programs and services that build the health and well being of all

- Engage medical community

- Serve more people in Health Innovations and group exercise

- Harness technology to connect to more people

- Expand corporate wellness



SOCIAL RESPONSIBILITY

To strengthen community by expanding our ability to address relevant needs and ensure services for all

- Increase people served in new and existing community needs programs

- Impact more lives through scholarships

- Seek collaborative partnerships

OUR MISSION: To put Christian principles into practice through programs that build a healthy spirit, mind, and body for all.

Creating Healthy Families and Communities

By 2023, YMCA of Southwest Florida plans to increase the number of people we positively impact through youth development, healthy living and social responsibility.

OUR INITIATIVES



SUSTAINABILITY

Achieve a higher level of effectiveness where our organization is growing strategically while remaining financially prepared for future opportunities

- Expand membership opportunities
- Engage more donors
- Create & deliver consistent family programs
- Implement formal staff pay scale
- Develop Association risk management plan



PEOPLE

Nurture staff and volunteer growth and cultivate greater connectedness to the YMCA mission

- Strengthen staff retention
- Provide expanded volunteer opportunities
- Increase staff engagement survey scores
- Invest in YUSA Leadership Certifications for staff



COMMUNITY

Ensure that our organization is meeting the needs of the communities we serve as they evolve and expand

- Deepen community collaboration
- Grow services beyond Y walls
- Cultivate greater connection to Cause Champions
- Build diverse Association & Community boards

DOCUMENTATION OF NATIONAL BEST PRACTICES OR EVIDENCE BASED PROGRAM DESIGN

Please refer to the following links for documentation.

BellXcel Power Scholars Evidence Base

<https://www.bellxcel.org/education-research-and-insights/>

Afterschool Programming Evidence Base

Neild, R.C., Wilson, S.J., & McClanahan, W. (2019). Afterschool programs: A review of evidence under the Every Student Succeeds Act. Philadelphia: Research for Action.

<https://www.researchforaction.org/projects/afterschoolessa/>

Summer Learning Loss and Benefits of Summer Learning Evidence Base

<https://www.brookings.edu/research/summer-learning-loss-what-is-it-and-what-can-we-do-about-it/>

Atteberry, Allison, and Andrew McEachin. (2019). School's Out: The Role of Summers in Understanding Achievement Disparities.

<https://www.wallacefoundation.org/knowledge-center/Documents/Every-Summer-Counts-A-Longitudinal-Analysis-of-Outcomes-from-the-National-Summer-Learning-Project.pdf>



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
PO Box 2508
Cincinnati, OH 45201

YMCA OF SOUTHWEST FLORIDA INC
701 CENTER RD
VENICE, FL 34285-4808

Date:
September 15, 2021
Employer ID number:
59-1629660
Form 990 required:
990, YES
Person to contact:
Name: Angela G Foster
ID number: 0203069

Dear Sir or Madam:

We're responding to your request dated July 28, 2021, about your tax-exempt status.

We issued you a determination letter in September 1976, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Section 509(a)(2).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax-deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period.

- Form 990, Return of Organization Exempt From Income Tax
- Form 990-EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at www.irs.gov/forms-pubs or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely,

Stephen A. Martin

Stephen A. Martin

Director, Exempt Organizations Rulings and Agreements

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