

1. What is Discretionary Funding?

Discretionary funding is a duly-appropriated sum of money in the Town's expense budget allocated to an eligible not-for-profit organization by the Selectboard and approved at Town Meeting.

2. What Types of Organizations May Receive Discretionary Funds?

Discretionary funds may only be allocated to not-for-profit; community-based social services providers. In order to receive discretionary funds directly, an organization must be incorporated as a not-for-profit and registered with the State of Vermont., unless exempt and have a Federal Employer Identification Number (EIN).

3. What Types of Organizations May Not Receive Discretionary Funds?

For-profit entities may not receive discretionary funds, except when the primary non-profit contractor subcontracts with a for-profit entity as part of the delivery of services. Such subcontracts, however, must be only an ancillary part of the program to be funded, not the primary basis for the discretionary award, and must be approved by the contracting agency.

4. What are the Restrictions on the Use of Discretionary Funds?

All public funds, however awarded, must be used for a Town purpose. In general, a Town purpose is defined as an activity or service that is open to all members of the public, regardless of race, creed, gender, religious affiliation, etc., without restriction, and which does not promote a particular religion.

Programs and services provided by religious or religiously-affiliated organization must be able to demonstrate that the program is open to non-members, is not a religious program, and does not promote the religion.

Closed membership groups, which are those to which membership is restricted or subject to eligibility based upon prohibited factors, may generally not receive funding.

Groups that serve a particular population, for example, those age 65 and above in a particular community; are not considered a closed membership group, as long as the program is open and accessible to all seniors in the community. Similarly, tenant organizations in public housing may also receive funding, as long as they provide equal access to all residents of the public housing units they serve.

Funds may only be allocated for a public purpose and may not support political activities and private interests.

5. How to Apply for Discretionary Funding?

All organizations that wish to receive discretionary funding must submit a "Request for Special Appropriations" application to the Town Manager. The application elicits information about an organization's experience, qualifications, and integrity, and the project or service for which the organizations is requesting support. The form is available on the Town website under DOCUMENTS, then, APPLICATIONS or by emailing Kathy Daub-Stearns, Administrative Assistant, at: kdaubstearns@richmondvt.gov . Deadline for submission is the end of the day, October 7, 2020.

Town of Richmond Request for
Special Appropriations Request for

Fiscal Year: 2022

Organization's Name: Lund
Address: 50 Joy Drive
City, State, Zip: South Burlington, VT 05403
Website address: www.lundvt.org

A. GENERAL INFORMATION

1. Program Name: General Operating

2. Contact Person/Title: Sharon Lifschutz

Telephone Number: 802-861-2580
E-mail address: sharonl@lundvt.org

3. Total number of individuals served in the last complete fiscal year by this program:
5,023

4. Total number of the above individuals who are Town residents: 32
Please, attach any documentation that supports this number.

These numbers come from our Electronic Health Record system. Please call if further explanation is needed

Percent of people served who are Town residents: Less than 1%

5. Amount of Request: \$1,000
6. Total Program Budget: \$10,338,138 Percent of total program budget you are requesting from the Town of Richmond: Less than 0.001%

7. Please state or attach the mission of your agency: Lund helps children thrive by empowering families to break cycles of poverty, addiction and abuse. Lund offers hope and opportunity to families through education, treatment, family support and adoption.

8. Funding will be used to:
X Maintain an existing program _____ Expand an Existing Program
_____ Start a new program

9. Has your organization received funds from the Town in the past for this or a similar program? Yes

If yes, please answer the following:

a. Does the amount of your request represent an increase over your previous appropriation? If yes, explain the reason(s) for the increase.

No

- b. Were any conditions or restrictions placed on the funds by the Selectboard? No
If yes, describe how those conditions or restrictions have been met.

B. PROGRAM OVERVIEW

1. Statement of Need: Identify the issue or need that the program will address (use statistical data to justify the need for the program). To what extent does this need or problem exist in the Town of Richmond?

In the wake of COVID-19, Lund's services are needed now more than ever. Since COVID-19 there has been:

- A spike in substance misuse and overdose deaths across the nation
- An increase in the number of recently released nonviolent people in Vermont
- A childcare staffing shortage in Vermont
- An uptick in anxiety, depression, and loneliness, also called COVID fatigue, both nationally and in Vermont

This reality is unnerving, and directly impacts our Vermont community, including residents in the Town of Richmond. And, the added uncertainty that comes with COVID-19 can exacerbate these issues. Lund is on the front lines, working proactively to ensure our clients have access to the resources, tools, knowledge and support to live healthy lives. We have adapted and innovated to meet the ever-changing needs of our clients, all while adhering to State policies and guidelines. We have dedicated professionals, who have risked their own safety and the safety of their families to ensure that our Residential and Child Care programs could continue, and we are supporting our staff who are feeling overwhelmed by the weight of their professional responsibilities as well as their personal realities. Hope, opportunity and family will continue to guide our organization, and we will continue to support over 5,023 individual Vermonters through our services, empowering families to break cycles of poverty, addiction and abuse.

2. Program Summary:

- a. Identify the target/recipients of program services. Specify the number of Town residents your program will serve during the fiscal year and explain the basis upon which this number is calculated. Indicate any eligibility requirements your program has with respect to age, gender, income or residence.

We offer a wide range of programs in three service areas: Adoption, Child and Family Services and Treatment for Mental Health and Substance Use Disorder. During this fiscal year, we anticipate that 32 Town residents will utilize at least one of Lund's programs. This number is calculated from our EHR, Employee Health Records system, which holds much of our client data. Lund provides family-centered and integrated services primarily to women and children under the age of 5, but we do have programs that serve families of all ages and genders. Diversity, inclusivity and equity are central to how we do our work, and we would never want age, gender, income or residence to be barriers for those looking to access Lund services.

- b. Identify what is to be accomplished or what change will occur from participating in the program. How will people be better off as a result of participating in the program?

Describe the steps you take to make the project known to the public, and make the program accessible and inclusive?

We have specific outcomes for each of our different programs that focus not only on the number of participants, but how successful they are after participating in each program.

For example, our Adoption department tracks the number of Adoptions, but also tracks the percentage of families reporting that they received the necessary services as they transitioned from foster care. Our Residential Treatment program tracks the number of women and children who access services, while also tracking the sustained rates of remission at 12 Months. It is our job to give clients the skills, tools, support and knowledge that they need to break the cycles of poverty, addiction, and abuse not only for themselves, but for their children.

One of our agency priorities for this year is telling Lund's story. Lund is a robust, multi-faceted organization that helps strengthen families and communities across the state in a variety of ways. Because of our breadth of services, it can be challenging to communicate what Lund is, how we do our work and why we do our work. What Lund does is incredibly necessary, especially in the wake of COVID-19, but people need to know about it. We have an incredible opportunity to professionalize our marketing and our development efforts to ensure we have the support and resources necessary to sustain our programs and grow our client base.

Lund must also ensure that employees and clients feel supported holistically and that all of their identities are seen and validated. Through training, access to resources, reviewing policies and procedures and growing our Diversity, Equity and Inclusion committee to be more representative of the agency as a whole, we are making important progress in building a welcoming, accessible and rewarding environment for all staff and clients. We do not shy away from acknowledging the role Lund has to advocate for staff and clients, and are deeply committed to taking a proactive role in unraveling racism and discrimination in order to ensure our programs are accessible and inclusive to all.

3. Program Funding:

- a. Identify how Town funds, specifically, will be used (i.e., funds will provide "X" amount of units of service.)

Town funds will be used to support agency general operating costs. The agency is required to raise \$1.5 million this year in order to continue to provide the high quality services that help families across the state.

- b. List the other agencies to whom you are submitting a request for funds for this program and the amount requested. How would this program be modified should revenues be lost?

The majority of our budget comes from state and federal government funding. We are also supported by United Way of Northwestern Vermont, private individual donors, local business and private foundations. We have also applied to several other towns in Chittenden County for funding including: Colchester, South Burlington, Bolton, Milton, Williston, Essex, Huntington and Hinesburg. If we were to lose significant unrestricted

funding, we would not be able to continue to offer the scope or depth of family-centered and integrated services at the current capacity.

C. ORGANIZATIONAL CAPACITY

1. Describe your agency's capability to provide the program including its history, previous experience providing this service, management structure and staff expertise.

Lund has a rich history of supporting Vermont's most vulnerable populations, dating back to 1890. While the name of our organization and the scope of our work has changed over the years, our desire to help create strong families and even stronger communities has remained at our agency's core. Lund provides Adoption, Child and Family and Treatment for Mental Health and Substance Use Disorder services across the state. Even during COVID-19, Lund was able to adapt to meet the needs of our community. Not a single client fell through the cracks since March, demonstrating our staff's resiliency and their strong commitment to our clients. We have a Leadership team of ten, led by our newly appointed President and CEO, and our Board of Directors works to support our Leadership team, making sure our agency has the resources needed to provide high-quality services to thousands of Vermonters. Lund's Leadership team represents a combined 80 years of experience at Lund and our Board of Directors represents diverse and prestigious leadership roles and areas of expertise.

2. How will you assess whether/how program participants are better off? Describe how you will assess program outcomes. Your description should include: what (what kind of data), how (method/tool for collecting the data), from whom (source of data) and when (timing of data collection).

Lund uses Results Based Accountability to assess our programs and ensure that we are achieving the desired outcomes for Vermont's families. We use a wide variety of methods to collect data including: clinical assessments, client surveys, staff assessments, and industry standard assessments such as educational screening tools. We are also investing in a new Electronic Health Records system which will help us efficiently retrieve outcome data.

3. Summarize or attach program and or service assessments conducted in the past two years.

Lund conducts yearly program analysis to ensure that our programs are meeting desired outcomes. This is coordinated by a program committee consisting of staff and board members.

4. Does your organization have a strategic plan and a strategic planning process in place? No- although we hope to go through a strategic planning process this year.

The strategic plan should include a mission statement, goals, steps to achieve the goals, and measures that assess the accomplishments of the goals.

5. What is the authorized size of your board of directors? 19
How many meetings were held by the board last year? 10

I, the undersigned, confirm the information contained herein is accurate and can be verified as such. I understand and agree that if the requested funds are approved, the disbursement of funds are subject to all conditions established by the Richmond Selectboard.

Signature of Applicant  Date 10/7/2020

Sharon Lifschutz, Foundations and Communications
Coordinator

Print Name of Applicant and Title

