



2021 Discovery Index

Established December 9, 2021

## Table of Contents

Budget and Financial Planning	3
IT, web, and social media	3
Losses	4
10-K And Other Annual Report Filings	4
Volunteer / Staff / Recruiting and Retention	4
Automation and Security	4
Community Awareness	5
Donor Base Development	5
Fundraising Methods	6
Program Development	6
Intake and Rehabilitation	7
Career Coaching and Workforce Development	7
Appendix	8

## Budget and Financial Planning

### Building and Location

As a result of the “New Norm” under the COVID-19 Pandemic beginning January 2020 all services are now offered virtually. Dustin Cox, Executive Director for the S.O.U.L Clinic of Kentuckiana Inc. will provide services from his own home using secure, HIPAA compliant software to store, document and communicate consumer relations. The physical location is 3410 Shagbark Rd. #11 Louisville, KY 40216. The mailing address for the clinic is P.O. Box 161625 Louisville, KY 40256.

Expenses for this facility are \$2,376.00 annually broken down to \$198.00 a month. Utilities are included in the monthly rent expenses. There is insurance for the physical location approximately \$360.00 annually broken down to approximately \$30.00 a month.

Building expenses are paid to Alltrade Property Management 710 Barret Ave. Louisville, KY 40204

Insurance is paid to Progressive Home at <https://www.progressivedirect.homesite.com>

### IT, Web, and social media

Information Technology (IT): the study or use of systems (especially computers and telecommunications) for storing, retrieving, and sending information. Is used to generate documents for policy and procedural purposes, verification letters and letters of support for consumers, and a myriad of other services as needed for day-to-day operations. IT support is provided free of charge by an anonymous donor with degrees in computer information systems. For the safety of the consumers and staff, multiple staff have been trained in De-escalation tactics, fire, tornado, and dangerous weather safety routes, and suicide prevention. All consumer data is stored in HIPAA compliant servers. NO consumer information is stored physically in the office or on devices used within the office.

The website <https://www.soulclinicofkentuckiana.org> is hosted by <https://www.webstarts.com> . Webstarts provides regular support and maintenance to the website as needed. An SSL Certificate (a digital certificate that authenticates a website's identity and enables an encrypted connection.) has been added to the website for additional security. The company email is supported by Office Space PCI to securely encrypt and communicate Protected Client Information among the network of community service providers.

The clinic is established on many of the major social media outlets to include Facebook, Instagram, twitter, LinkedIn and Tok-tok.

### Transportation annually

\$600.00

Transportation expenses for the Executive to commute to and from network meetings and events related to work around Metro Louisville is a \$50.00 monthly expense.

**Office supplies**

\$758.91

Primary office supplies include black and color ink for office printer, boxes of envelopes, coil of stamps, printer paper. These are the immediate needs to make the office function monthly.

**Post Office Box**

\$284 annually

A post office box is required to conduct business for the organization. A size 3-M box would be sufficient to send and receive packets and large envelopes both for the organization and for our consumers.

**Profit and Loss**

The profit and loss (P&L) statement is a financial statement that summarizes the revenues, costs and expenses incurred during a specified period, usually a fiscal quarter or year. Quarterly reports are submitted by the Treasurer at each board of directors' meetings and is reviewed, discussed, and approved before the next quarter can begin.

**Annual Filing**

Each year by June 30, the Executive Director submits an annual filing to the Kentucky Secretary of State. And submits a form 990-ez to the Internal Revenue Service to maintain active tax-exempt status.

**Volunteer / Staff recruitment and retention**

Refers to the process of attracting, screening, and selecting qualified people for a position within an organization. It is an important management activity in securing an effective workforce. Retention strategies strengthen the ability of businesses to attract and retain their workforce. This organization is consumer-operated, and volunteer based. To offer our services free to the consumers we ask that they contribute to daily tasks within the office. Some consumers go a step further and become a peer support provider assisting with intake, helping to fill out forms, answering phones, working the front desk, and a myriad of other tasks. Other volunteers are received by Kentuckiana Works /Power of Work/SNAP ABOD compliant individuals that must volunteer a minimum of 20 hours a month to maintain their SNAP/Medicaid benefits if they are unemployed and looking for work.

**Automation and Security**

Building security is provided by Geeni Smart Home. Upon receiving space for operations, we were issued 3 wireless security cameras that safely secures the building throughout the day. It has been advised that if the building is breached the security cameras will record all activity and store in the cloud for review and have provide a file to download for police investigation.

Additionally, keys have been issued to 4 staff members. One set to the Executive Director, One set to the Executive Assistant, One set to a part time regular volunteer and another set to property maintenance. The Executive Director holds the key to the door of the unit/office and the P.O. Box. The Executive Assistant and other staff only have a key to the unit. For the safety of the consumers and staff, multiple staff have been trained in De-escalation tactics, fire, tornado, and dangerous weather safety

routes, and suicide prevention. All consumer data is stored in HIPAA compliant servers. NO consumer information is stored physically in the office or on devices used within the office.

### **Community Awareness, Engagement and Education.**

Definition: ... to learn from and share information actively and meaningfully with different segments of the community to enhance knowledge, skills and behaviors that promote optimum community development opportunities. Currently the S.O.U.L Clinic of Kentuckiana Inc. actively attends the monthly Coalition for the Homeless Louisville, Continuum of Care meeting which is held on the 1<sup>st</sup> Monday of each month at Metro United Way. Additionally, we attend the monthly Case Manager's Lunch & Learn held at Metro United way on the second Monday of the month. Also, the Greater Louisville Re-entry Coalition meeting held on the 4 Wednesday of each month. And finally, the Transitional Community Partners Network Meeting on the 2<sup>nd</sup> Wednesday of every other month. These meetings are an opportunity for the clinic staff to network and collaborate with other established networks and newly developed agencies who share and combined desire to help less fortunate individuals get re-established. We are always open to other community events as they arise.

### **Donor Base**

Development 1. Raise awareness How many potential donors are even aware that your Nonprofit exists? To develop a donor base, people need to have heard of your organization! One proven method for raising awareness is to have your organization host a large and impactful fundraising event. Attractive events like a sports tournament, dinner gala or a benefit auction will draw in large crowds and help to enhance your Nonprofit's credibility and status. Before the event, be sure to advertise early and often. By raising awareness about the event, you'll simultaneously be spreading the word about your Nonprofit's mission.

2. Instill a Desire to Contribute The day of the big event, make sure attendees leave with the desire to support your mission. Dedicate a portion of the evening to informing the attendees about your mission, how their money will be used and why your organization needs funding. Be passionate! You want your attendees to feel like they are part of your mission. The best way to engage guests is to share stories, not statistics. Get an employee or audience member to tell their personal story, why they got involved with your Nonprofit and what it has done for them. Depending on your cause, this is also a great opportunity to share stories of success. Tug at the heartstrings of your benefactors!

3. Keep Donors Contributing reaching out to donors doesn't stop after the event is over. Donors may have felt a strong desire to support your mission at the event but follow up communication is the key to keeping them engaged. Whenever your donors contribute, whether it's during or after the event, say thank you with personal phone calls and hand-written cards. For your bigger donors, take it a step further to build a relationship with them and invite them out to lunch or coffee. Be sure to preface your invitation with your intention to gather input from your biggest and most important contributors. Once you're on your "Donor Date", ask for feedback then listen! You don't have to take everything they say as gospel. The point here is to make them feel heard. Donors who feel heard will continue to stay engaged and be more inclined to donate in the future.

4. Keep Donors Connected To keep donors up to date on the impact their money has

made, share your Nonprofit's progress and goals on a regular basis. One of the most effective - and cheapest - means for doing so is a monthly email newsletter. Email services such as MailChimp offer easy-to-use free accounts for organizations with less than 2,000 on their mailing list. For anywhere north of that you're looking at \$30-\$50, which is well worth it to keep you donors connected. Email campaigns can also be especially useful for fundraising events. Just a few of the most important emails for event organizers to consider

include:

- **Market Your Event:** These emails should start going out 3-4 months in advance, with an updated version going out every couple week. Tease your audience with a preview of the event's entertainment or auction items if you have them. Build excitement!
- **Event Registration:** Start sending a link to the ticket/registration page at least 1-2 months prior and keep them going every week until the event.
- **Event Recap:** Share your fundraising total, include stories from the event, highlight winners, etc. This can go out any time after the event, but it's usually best to keep it within 1-2 weeks to stay relevant. In every email you send to your mailing list - whether it's for an event or just a general newsletter - make sure there is an easy and obvious way for the recipient to donate on the spot. Create a conspicuous "Donate" button that takes them to a donation page and place it in the same place on every email.

Another important section to include on every email is a feedback section. Make sure you are always asking donors for their input and advice on future projects. It's important that donors feel like they are contributing more than just money. You can do this by including a link to a survey or telling them to respond to the email.

### **Fundraising Methods**

Fundraising is an integral part of any non-profit organization. Many of the clinic fundraising methods include but are not limited to bucket shakes, phone banking, letter/email writing, word of mouth, raffles and bake sales. Money received from fundraising efforts help to cover the cost of materials for the clinic, vital records for consumers, bus fare for consumers, and any miscellaneous expenses that may occur. Fundraising reports are submitted to the Treasurer to be included with the quarterly financial reports.

### **Program Development**

Program Development is: The process of formulating, improving, and expanding educational, managerial, or service-oriented work plans. Current programs in place and active are:

**180 Degrees:** Assistance in applying for housing, healthcare, education, employment, transportation, vital records, phones, and any other services.

**Housing First:** Assistance approach that prioritizes providing permanent housing to people experiencing homelessness, thus ending their homelessness, and serving as a platform from which they can pursue personal goals and improve their quality of life.

Pay Day: Career assessment, resume writing, job training, assistance in applying for employment, advocating for applicant to the employer and referrals to other job training programs as needed.

Moving Forward is our transportation program that offers, bicycle, bus passes, and Lyft rides to and from work until consumer receives second paycheck.

Legal information: Explains the law and the legal system in general terms. The information is not tailored to a specific case. Consumers will meet with a peer to complete Supplemental Security Income, Disability, Expungement, Divorce and Landlord/Tenant disputes screenings. If a consumer meets screening eligibility requirements paperwork will be completed with consumer to file for respective service.

The SOUL Patch: Clothing closet. Clothing ranges from everyday wear to executive wear. Consumers can be fitted for clothing upon request and will learn how to properly clean and managing clothing.

This is me: Aids in obtaining a state issue identification card, driver's license, birth certificate, social security card.

New Heights Enrollment: We offer access to life skills and applications offered in many forms such as: In home, office, library, department of corrections, and web based.

Prescription Assistance: The Kentucky Prescription Assistance Program (KPAP) helps qualifying Kentuckians and/or their families locate free or reduced-cost prescription drugs through assistance programs offered by the drug manufacturers, discount drug programs and discount pharmacy programs.

### **Consumer Intake and Rehabilitation**

Consumer intake begins on the first day a consumer arrives at the office or by referral from friend, staff, networking agency or self-identification or applies online from the clinic website. The consumer is then issued a case identification number to keep record of services provided to the consumer. From day one the clinic program has up to 180 days (6 months) to assist a consumer in obtaining housing, healthcare, education, employment, vital records, counseling, eligible benefits, an any other services the consumer may need to function on a day-to-day basis.

### **Career Coaching and Workforce Development**

Career coaching is a sector that has grown exponentially in the last decade. The goal of career coaching is to empower professionals by helping them make informed decisions about their trajectory. It's a solution-based approach to career decisions. Career coaches focus on results, actions, and accountability. Workforce development, an American approach to economic development, attempts to enhance a region's economic stability and prosperity by focusing on people rather than businesses. It essentially develops a human-resources strategy. We offer career assessment, resume writing, reference letters, cover letters, hands on job training, job placement and employment ready clothing.

