

**City of Plano Staff Review Checklist  
2010 Consolidated Grant Application**

Agency: Journey of Hope

Program: Children's Bereavement Services

Application Type: Program Service      Permanent Housing      Site/Equipment

- One Copy of Grant Cover Sheet, Application, CD, and Attachments
  - Original signatures on cover sheet
  - Unbound, no staples, loose leaf format
  - Printed on one side of white 8½" x 11" paper,
  - With page numbers
  - All pages included
  - No blank answers on application - page 3 letter B + Page 8 letters C+D left blank

Attachments

- 1 - Detailed Annual Organization Budget for Current Fiscal Year
- 2a - List of Organization's Officers/Board Members
- 2b - Board Annual Meeting Schedule
- 3 - Resume of Director
- 4 - Copy of Organization's latest tax return accepted by IRS
- 5 - Copy of Organization's Certificate of Good Standing from State Comptroller's Office
- 6 - Copy of Organization's most recent audit of Financial Records
- 7 - Organization's Audit Information Certification Form
- Program Service 8 - Detailed Annual Program Budget
- Site /Equipment 8 - 2 or 3 bids

Organization Eligibility

- Must use proposed funds for Plano residents
- Non-profit or public agency
- In compliance with any previous City of Plano contracts
- Operation for a minimum of three years

Completed by: Monique Coleman  
Staff

3-23-2010 11:22am  
Date & Time

Journey of Hope Grief Support Center Budget showing Plano Request

Income	Budget Line Items	Category Totals	Subtotal Plano Program support	Grant Request
4020 - One In A Million	-			
4030 - Annual Campaign	12,000.00			
4050 - Contributions	25,000.00		10000	
4055 - Matching Gift Challenge	-			
4056 - Matching Gift Honored	-			
4080 - Corporations	25,000.00		5000	
4100 - Community Support	14,000.00		10000	
4110 - Faith Based Organizations				
4120 - Schools				
4140 - Service Organizations				
4100 - Community Support - Other				
<b>Total Support Income</b>		<b>76,000.00</b>		
<b>4300 - Fund Raisers</b>				
4301 - Golf Tournament				
	30,000.00			
	(8,500.00)			
<b>Total 4301 - Golf Tournament</b>		<b>21,500.00</b>	5000	
4302 - Easter Bunny Event				
	24,000.00			
	(7,000.00)			
<b>Total 4302 - Easter Bunny Event</b>		<b>17,000.00</b>	5000	
4303 - Warren's Walk				
	12,550.00			
	(1,000.00)			
<b>Total 4303 - Warren's Walk</b>		<b>11,550.00</b>	5000	
4350 - CUMC Alternative Valentine	1,800.00	1,800.00	1800	
4399 - Other				
<b>Total 4300 - Fund Raisers +donations</b>		<b>127,850.00</b>		
<b>4400 - Grants</b>				
<b>Total 4400 - Grants</b>	52,769.00	<b>52,769.00</b>	3500	15,000.00
<b>4550 - Misc Inc</b>				
4510 - Facilitator Fees	1,725.00			
4552 - Interest/Investment	250.00			
4554 - Reimbursed Expenses	-			
<b>Total 4550 - Misc Inc</b>		<b>1,975.00</b>		
<b>4600 - Sales</b>				
4610 - Curriculum Books	120.00			
<b>Total 4600 - Sales</b>		<b>120.00</b>		

Journey of Hope Grief Support Center Budget showing Plano Request

**4660 - Program Events**

4661 - Believe In Journey -  
 4663 - JOH 10th B'dY -

**Total 4660 - Program Events**

**Total Income** 182,714.00 45,300.00 15,000.00

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	<b>Total Budget</b>	<b>Plano Portion</b>	<b>Grant Request</b>
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**Expense**

**6000 - Depreciation/Amortation** 1,068.00 1,068.00 352.44

**6200 - Insurance**

6210 - Directors,Officers,Emp,Prof 1,400.00  
 6220 - General Liability 1,450.00  
 6230 - Workers Comp 700.00

**Total 6200 - Insurance**

3,550.00 1,171.50 1,100.00

**6250 - Local Travel**

6252 - Mileage Reimburse -  
 -

**Total 6250 - Local Travel**

-

**6270 - Service Charges**

6272 - Bank 50.00  
 6274 - Credit Card Donations 1,050.00  
 6270 - Service Charges - Other -

**Total 6270 - Service Charges**

1,100.00 363.00

**6300 - Occupancy**

6310 - Janitorial 500.00 1.00  
 6320 - Internet 775.00  
 6330 - Telephone 2,100.00  
 6340 - Rent - Program Facility 1,100.00  
 6350 - Rent - Ofc. 36,252.00  
 6360 - Software 100.00  
 6390 - Equipment/Furniture 100.00  
 6395 - Maintenance 150.00

**Total 6300 - Occupancy**

41,077.00 13,555.41 2,000.00

**6400 - Postage**

6410 - Stamps/Metering 1,500.00  
 6420 - Box/Bulkmail Permit  
 6430 - Shipping -  
 6400 - Postage - Other -

**Total 6400 - Postage**

1,500.00 495.00

**6450 - Printing and Reproduction**

6452 - Brochures 500.00

Journey of Hope Grief Support Center Budget showing Plano Request

6454 · Business Cards	140.00		
6456 · Envelopes			
6457 · Invitations			
6458 · Letterhead	351.00		
6460 · Newsletter	1,500.00		
<b>Total 6450 · Printing and Reproduction</b>	<b>2,491.00</b>	<b>822.03</b>	
<b>6500 · Professional Development</b>			
6510 · Administrative Assistant			
6515 · Program Assistant			
6520 · Executive Director	430.00		
6530 · Program Coordinator	700.00		
6535 · Outreach Coordinator			
6540 · Facilitators/Volunteers			
6545 · Travel/Meals/Lodging	2,000.00		
<b>Total 6500 · Professional Development</b>	<b>3,130.00</b>	<b>1,032.90</b>	
<b>6550 · Professional Fees</b>			
6555 · Audit	4,000.00		
6570 · Legal			
6572 · Consultants	-		
6575 · Contract Labor	-		
<b>Total 6550 · Professional Fees</b>	<b>4,000.00</b>	<b>1,320.00</b>	<b>1,000.00</b>
<b>6600 · Program Operation</b>			
6612 · Resource Material	250.00		
Session Meals	3,850.00		
Teddy Bears	1,500.00		
6620 · Recognition Items	500.00		
6640 · Special Events			
<b>Total · Program</b>	<b>6,100.00</b>	<b>2,013.00</b>	<b>500.00</b>
6660 · Community Outreach	250.00		
6670 · Recruitment/Verification	100.00		
6682 · Dues/Memberships	650.00		
6684 · Subscriptions	100.00		
6690 · Program Supplies	900.00		
6696 · Session Support	700.00		
<b>Total 6600 · Program Operation</b>	<b>2,700.00</b>	<b>891.00</b>	<b>900.00</b>
<b>6700 · Salaries</b>			
6710 · Administrative Assistant	11,440.00	3,775.20	
6715 · Program Assistant	2,070.00	683.10	
6720 · Executive Director	58,000.00	19,140.00	
6730 · Program Director	32,000.00	10,560.00	9,500.00

Journey of Hope Grief Support Center Budget showing Plano Request

6740 · Outreach Coordinator	-		
<b>Total 6700 · Salaries</b>	<u>103,510.00</u>		
<b>6750 · Salary Costs</b>			
6752 · Payroll Processing	1,350.00		
6755 · Taxes	9,500.00		
6760 · Medical/Dental	-		
<b>Total 6750 · Salary Costs</b>	<u>10,850.00</u>	3,580.50	
<b>6800 · Supplies</b>			
6810 · Office	538.00		
6820 · Printer	1,100.00		
6800 · Supplies - Other	-		
<b>Total 6800 · Supplies</b>	<u>1,638.00</u>	540.54	
	<b>182,714.00</b>	<b>60,295.62</b>	<b>15,000.00</b>

Total Plano  
Program  
Support

**60,300.00**



**D/Admin**

admin

Admin

admin

Direct

Direct

Direct

Both

Admin

Direct

Direct

Direct

Both

admin

Sandra Aikins  
Plano  
Licensed Professional Counselor Supervisor;  
retired as Director of Counseling, Plano ISD  
Caucasian

David Ayers  
Dallas  
Owner of Ayres Financial Group  
Caucasian

Mark Bernthal  
Plano  
Freelance Writer, retired Sr. VP of Shakey's  
Pizza  
Caucasian

Glenna Blackstone  
Plano  
Office Manager, DALNOR Group  
Caucasian

Fred Bourg  
Melissa  
R&D Sr. Group Manager, Frito Lay North  
America  
Caucasian

Marsha Clark  
Frisco  
Consulting, Leadership Training, Marsha Clark &  
Associates  
Caucasian

Carol Crowell  
Plano  
Director of Acute Care  
Baylor Hospital of Plano  
Caucasian

Geraldine "Gerry" Haggard  
Plano  
Retired Educator, JOH Curriculum writer  
Caucasian

Dave Pearce (Treasurer)  
Plano  
Engineer, Texas Instruments (retired)  
Caucasian

Lauren Nannette Pirek (1<sup>st</sup> Vice President)  
Plano  
Marketing Account Coordinator, Levi Strauss &  
Co.  
Caucasian

Kathleen Rice (President)  
Plano  
CPA;educator  
Caucasian

Jack Schulik  
Plano  
Writer, Plano Profile; retired businessman  
Caucasian

Michelle Weihing (2<sup>nd</sup> Vice President)  
Frisco  
Legal Assistant, Hanshaw Kennedy  
Caucasian

Linda Jung Wong (Secretary)  
Plano  
Educator and Civic Volunteer  
Asian

## *Journey of Hope Grief Support Center*

### FY 10 Board of Director Meeting Schedule

<b>2010</b>	
October 25	
November 29	
December TBD	No meeting unless called

<b>2011</b>	
January 24	
February 28	
March 28	
March 26	Breakfast with the Easter Bunny
April 25	
May 23	
June 27	
July 25	Golf Tournament?
August 22	
September 26	

Board meetings are usually held the 4<sup>th</sup> Monday of the month at 7:00 p.m.  
At the Journey of Hope office unless otherwise noted.

# Susan Tucker Williams

## Professional experience

Journey of Hope Grief Support Center, 1/11/05 – present, Plano, Texas

Executive Director

- Head of staff, administration, fund development and grant writing; program planning and development; fiscal management; raising community awareness; expanding collaborations; speaking to community groups and organizations; setting goals and direction with Board of Directors; strategic planning;

Dallas Children's Museum, 8/99- 1/05                      Dallas, Texas

Executive Director

- Head of staff, administration, fund development and grant writing; exhibit planning, program development; planning, day to day operations, fiscal management; setting goals and direction with Board of Directors; strategic planning;

Utah Arts Council, 1/98-8/99                                      Salt Lake City, Utah

Assistant Coordinator, Arts in Education

- Supervision of artists, grant writing assistance, creating grant, report and evaluation forms, record keeping, assisting grantees, recommending procedures, teaching arts education principles, planning future Council expansion, newsletter, reporting to Council and National Endowment for the Arts

Children's Museum in New Braunfels, 94-98 New Braunfels, Texas

Executive Director

- Administration, grant writing, exhibit planning, program planning and supervision, personnel, planning, day to day operations, fiscal management and planning, setting goals and direction with Board of Directors.

University of Texas, El Paso, 90-94                              San Antonio, Texas

Program Director

- Create, organize, implement statewide energy education program for Texas Public Schools under sponsorship of Governor's Energy Office, write grants, create/present public education programs, establish outreach office, report to UT El Paso and Governor's Energy Office

Permian Basin Petroleum Museum, 85-89                      Midland, Texas

Education Director

- Organize/implement educational programs for public schools and adults and visitors, seek funding, create self funded programs, write newsletter articles, plan with other staff for museum goals and exhibits

Education                      2005- Certificate in Nonprofit Leadership, SMU in Legacy & Center for Nonprofit Management

2006-07—Leadership Plano Class 24

1988- Master of Arts, History                                      University Texas, Permian Basin

1982- Bachelor of Arts, History, Literature University of Texas, Permian Basin

- 21 hours post graduate work in Psychology, mass media
- 1986 graduate, Winedale Museum Seminar
- 91 undergraduate hours, University Texas at Austin
- Seminar: Helping Grieving Children & Teens, American Academy of Bereavement, 2005
- Facilitator Training: Sharing Place Grief Support Center for Children, 1998
- Facilitator Training: Journey of Hope Grief Support Center, 2000
- Facilitator Training: Journey of Hope Grief Support Center, 2005
- numerous nonprofit management/fund raising seminars

## Service

- Preschool, elementary and teen group facilitator—Journey of Hope
- Association of Children's Museums Program Committee 04-05
- Elementary age group facilitator, Journey of Hope Grief Support Center, 1999-2000
- Teen age group facilitator, Sharing Place, a grief support center for children and families, Salt Lake City, 1998-1999

## Publications

*Take Yourself Back*, An Activity Book for Children, The Children's Museum in New Braunfels, 1995

*Cooking With Solar Energy*, University of Texas, El Paso, 1994

Energy Education, K-6; *Teacher's Guide*, University of Texas, El Paso, 1993

"Partners in Progress," *Odessa*, Windsor Publications, Chatsworth, CA, 1991

**CITY OF PLANO**  
**2008 BUFFINGTON COMMUNITY SERVICES GRANT**  
**QUARTERLY REPORT**

October 1, 2008 - September 30, 2009

*Section 1: Basic Grant Information*

**AGENCY NAME** Journey of Hope grief Support Center

**Grant Amount** \$ 5,000

**Allowable expenses:**

**Reporting on:** People  Families

*Section 2: Table of Total Expenditures and Demographics*

	Grant Funds Spent	Total Assisted	Race				Ethnicity H
			AA	W	A	O	
<b>1st Quarter Totals</b>	\$3975.38	78	2	56	3	9	8
<b>2nd Quarter Totals</b>	\$524.62	53	1	37	1	5	9
<b>3rd Quarter Totals</b>	\$500	21	3	14		4	
<b>4th Quarter Totals</b>	\$0	14	3	7	0	0	4
<b>Annual Totals</b>	\$5000	166	9	114	4	18	21

*Section 3: Specific Grant Expenditures*

**1st Quarter**

October 1 thru December 31, 2008: Due by January 31, 2009 3975.38

Expenses	Actual spent	City Grant spent	2008-09 Budget
Occupancy	1023.67	500	500
Postage	567.12	500	500
Printing/Reproduction	6.23	0	500
Program Operation	475.38	475.38	1000
Salary (Program director only)	8307.72	2500	2500
<b>Total</b>	<b>10380.12</b>	<b>3975.38</b>	<b>5000</b>

Remaining to be spent: \$500 in Printing/Reproduction category

\$524.62 in Program Operation

**Total remaining: \$1024.62**

**2nd Quarter**

January 1 thru March 31, 2009 : Due by April 30, 2009

Expenses	Actual spent	City Grant spent	2008-09 Budget
Printing/Reproduction	0	0	500
Program Operation	552.22	524.62	1000
<b>Total</b>	<b>552.22</b>	<b>524.62</b>	<b>5000</b>

Remaining to be spent: \$500 in printing/Reproduction

**Total Remaining: \$500**

**3rd Quarter**

April 1 thru June 30, 2009 : Due by July 31, 2009

Treasurer changed reporting of Printing/reproduction to another line item, which is Printer, and so no Printing Reproduction costs were reported in first two quarters, though there was spending for printing, it was not for outside printing. So this third quarter report contains all quarters for printing, with separation by quarter as follows: 1<sup>st</sup>: \$165.93 (including \$6.23 already reported, but not subtracted from grant total); 2<sup>nd</sup>: 195.69; 3<sup>rd</sup>: 297.17, totaling \$658.79. This change reflects our economics, as we have printed in-house, only, and not ordered new stationery, business cards as we budgeted. We will be ordering, but may not be billed in this FY.

Expenses	Actual spent	City Grant spent	2008-09 Budget
Printing/Reproduction	658.79	500	500
Total	658.79	500	500

**4<sup>th</sup> Quarter**

No City grant funds remaining to be spent in this quarter.

**Section 4: Certification of Compliance with Grant Conditions**

I hereby certify Journey of Hope Grief Support Center has complied with all the terms and conditions of the grant agreement and that the public funds received from the City of Plano pursuant to that agreement have been spent for the public purposes for which they were granted.

By: [Signature]  
 Name 1: \_\_\_\_\_  
 Title: Executive Director  
 Date: 10-28-09

By: [Signature]  
 Name 2: \_\_\_\_\_  
 Title: Vice President  
 Date: 10/28/09

**ACKNOWLEDGMENTS**

STATE OF TEXAS §  
 §  
 COUNTY OF COLLIN §

This instrument was acknowledged before me on the 28<sup>th</sup> day of October, 2009 by Executive Director of Journey of Hope Grief Support Center,  
(NAME 1, TITLE – EITHER EXECUTIVE DIRECTOR OR BOARD MEMBER) (AGENCY NAME)  
 a Texas non-profit corporation, on behalf of said corporation.



[Signature]  
 Notary Public, State of Texas

STATE OF TEXAS §  
 §  
 COUNTY OF COLLIN §

This instrument was acknowledged before me on the 28<sup>th</sup> day of October, 2009 by Vice-President of Development, Board of Directors of Journey of Hope Grief Support Center,  
(NAME 2, TITLE –BOARD MEMBER) (AGENCY NAME)  
 a Texas non-profit corporation, on behalf of said corporation.



[Signature]  
 Notary Public, State of Texas

## ***Section 5: Accomplishments Narrative***

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Goals set forth in the proposal:

1. To serve in support groups 75% of clients who contact us for service.
2. To keep 90% of clients in a support group for a minimum of 6 sessions (21 sessions possible in one year).
3. To train 50 new facilitators each year.
4. To survey 100% client families for both demographic information and children's behaviors at initial contact.

Total assisted 505, from Plano 166 =66% of all clients served lived in Plano.

Goals:

1. Serving 75% of all clients who contact us for service. We served about 80% of those who contacted us (and were eligible for) our service. Others were referred to counseling, delayed their start date or decided not to attend JOH.

2. To keep 90% of clients in support groups for 6 sessions. This year we kept only about 72% in six or more sessions, but the average of all clients attending sessions was still above 6, at 8 sessions. Most clients who do reach 6 sessions, continue many more sessions. Four sessions seems to be a "benchmark", that is, if they attend four, they are likely to stay longer, but scheduling, sports, family need, work changes, moving, and distance are all included in reasons families do not stay. We have only one or two a year reporting that they did not think JOH was helping as a reason they did not continue their sessions. It is still our goal to have 90% stay six sessions or more, because research shows that it is more beneficial for clients to have support over a longer period.

Our plan to increase the percentage includes the following:

- a. More follow up with families by phone after their first session;
- b. Continuing to stress at intake the importance of staying in the program, and informing families what the research indicates about staying longer in support to benefit their children
- c. Giving families more education about the issues that often develop with unresolved grief
- d. Providing more parent training opportunities as an adjunct to grief support.

3. Train 50 new facilitators: This year we trained 47 facilitators; fortunately we also employed 5 as volunteer interns, which provided more program assistance for our agency.

4. Survey 100% of clients for demographics. We are successful in this regard, now as it is a standard in our intake process.