



ADVOCATES - CRISIS, TRAUMA,
& SURVIVOR SERVICES

TRANSITIONING TO THRIVE

A PRAGMATIC PATHWAY
TO NAVIGATE HARD
CHANGE AND CREATE
SUSTAINABLE
ABUNDANCE

INTRODUCTIONS:

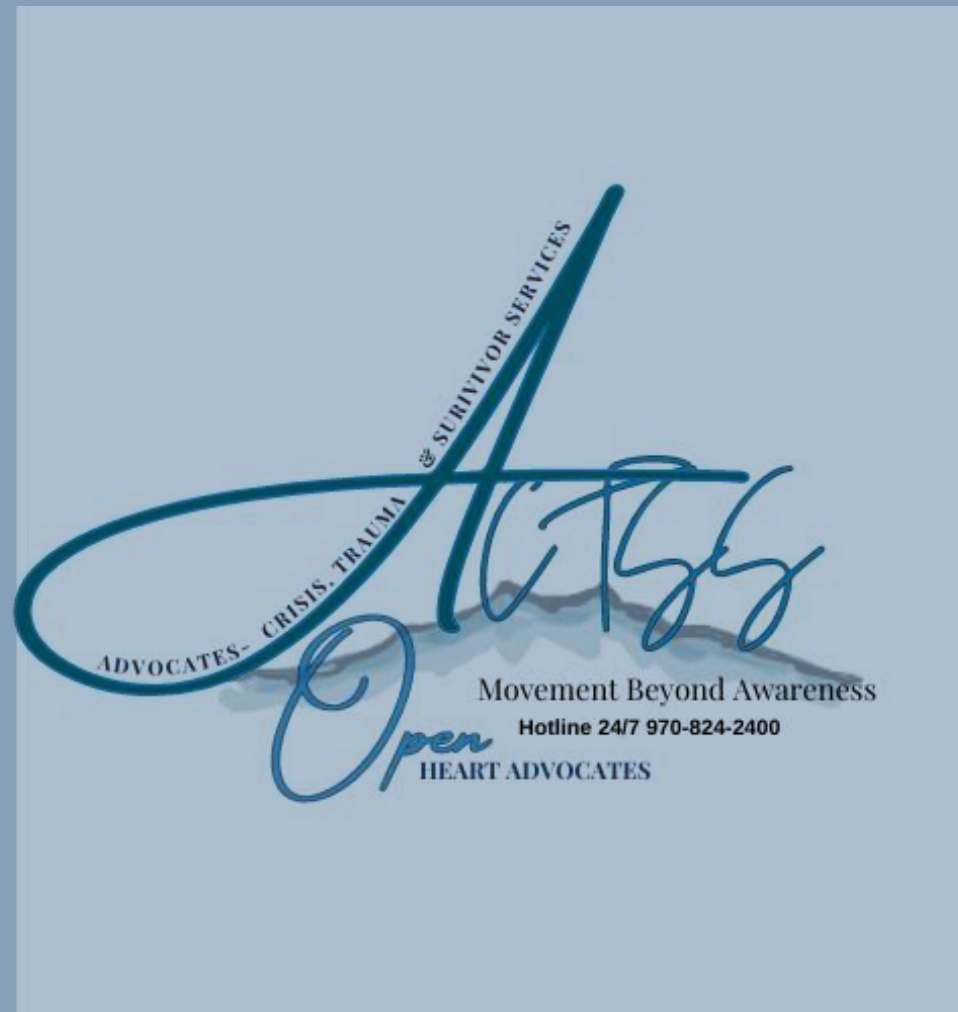
**Kyle Miller, PharmD,
COO MRH, CEO CCMRH**

**Kristine Cooper, MHA
Vice President of Clinical Services MRH**

**Jamie Fraipont-Daszkiewicz
Ex Director- Open Heart Advocates**

**Michaela Booco-Smith
CCR Manager - Open Heart Advocates**

**Monique Williams
DVSA Manager- Open Heart Advocates**



OUR WHY:

MISSION

TO PROVIDE
QUALITY, ACCESSIBLE,
COMPASSIONATE AND NON-
JUDGMENTAL SERVICES IN A
MANNER THAT FOSTERS SELF-
RESPECT, DIGNITY AND
INDEPENDENCE IN PERSONS
EXPERIENCING CRIME, VIOLENCE
AND TRAUMA; LEADING THE
STRUGGLE TO CREATE
COMMUNITY HEALING AND
SAFETY THROUGH ADVOCACY AND
EDUCATION

VISION

WE ENVISION A COMMUNITY
WHERE HUMANS EXPERIENCING
TRAUMA, CRISIS AND CRIME ARE
SUPPORTED IN HOLISTIC ,
HUMAN CENTERED NETWORK OF
SERVICE AGENCIES FOCUSING ON
PERSPECTIVE CONNECTION,
COMPASSION AND TRAUMA
SPECIALIZED SERVICES. THAT WE
CAN END GENERATIONAL
TRAUMA CREATED BY BROKEN
SYSTEMS, HARMFUL SOCIETAL
BELIEFS AND CURATE A CULTURE
OF COMMUNITY HEALING AND
INDIVIDUAL JOY.

QUICK DATA GLIMPSE

Open Heart Advocates - 5 years Services

FY Year	2019	2020	2021	2022	YTD 2023		
ALL CONTACTS	2674	2365	11230	40945	21529		
SHELTER NIGHTS	481	787	2123	2001	932		
HOTLINES	409	270	611	1665	601		
CLIENTS-Unique Individuals	54	249	948	1859	1019		
MONTHLY CASELOAD	12	42	86	178	243	AGENCY GOALS FY23	AGENCY GOALS FY24
FTE CASE COORDINATION	2	2.5	4	6.5	8.5	8	10
CLIENT DAYS in SERVICE	21	40	67	138	149	150	200
PRN STAFF	7	6	4	3	2	3	1
Staff to Case Ratio	STANDAR D	STATE	OHA 2021	OHA 2022	OHA YTD 2023	GOAL FY23	GOAL FY24
	7 to 12	6 to 8	21.5	27.3	28.8	21	19

1978 - 2023

Our History

An idea and service started in 1978 to support our those in our community who experience crime, trauma and crisis. First as Advocates Crisis Support Services for the first 4 decades, then in late 2010's ACSS experienced it's own victimization, by those entrusted with it's care. Just like those they served in order to find space to survive they had to lean on others, giving up autonomy for safety. In 2018, Memorial Regional Health under the direction of Bekka Warren merged with ACSS to form Open Heart Advocates, a dba under their non-profit CCMRH. With the ongoing support of Moffat County and City of Craig, time and new leadership afforded Open Heart Advocates the needed supports to find stability and grow. From a skeleton staff of 3 in 2019 to a lean working machine of 13 today, that serve over 2000 community members a year, using evidence based best practice to provide quality wrap around services. OHA exceeded expectations and has found itself pushing at the limits of current container.

Which leads us to ASK

WHAT'S NEXT





TRANSITIONING TO THRIVE

GAINING AUTONOMY AND
INDEPENDENCE AS A STAND ALONE
NON-PROFIT WITH A 501C3 STATUS

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A MONTH PROCESS DEADLINE TO SET A STABLE FOUNDATION FOR OUR FUTURE, TO CONTINUE AS A COMMUNITY LEADER AND SERVICE AGENCY , WITH THE SUPPORT OF OUR LONG TERM COMMUNITY PARTNER, MEMORIAL REGIONAL HEALTH, AND THE SERVICES OF MCCORMICK CONSULTING. USING A PRAGMATIC APPROACH TO SUSTAINABLE ABUNDANCE.

THIS TRANSITION ALLOWS OPEN HEART ADVOCATES TO EVOLVE INTO ADVOCATES- CRISIS, TRAUMA AND SURVIVOR SERVICES. KEEPING OPEN HEART ADVOCATES AS OUR SURVIVORS OF CRIME PROGRAM. THIS CHANGE HONORS BOTH WHERE WE HISTORICALLY CAME FROM , THE SUPPORT OF MRH, BUT ALSO A NEW CHAPTER FOR US IN COMMUNITY. A NEW NAME TO TELL A BETTER STORY OF WHO WE ARE AND WHAT WE DO.

ADVOCATES- CRISIS, TRAUMA & SURVIVOR SERVICES
dba
OPEN HEART ADVOCATES





WHAT WE HAVE DONE

- The paperwork, legal and financial processes are being handled and expected to run smoothly , EIN and SOS done
- Direct Services and Staff are running with minimal disruptions, this includes pay for all Direct Service Staff, positions are fully covered thru July 2024
- The partnership and support of MRH and CCMRH should facilitate our grants and funding sources to transition as well.
- The shelter and car will remain with Advocates
- Expected transition completion date is 12/31/23
- Community support and our reputation is high, and the impact of transition only supports them
- Google Workspace & VS Tracking will remain our platforms
- We have already our own policies and procedures done, as well as training platforms
- Discussions with our Funders and Governing Bodies have gone well and processes for transition are in place

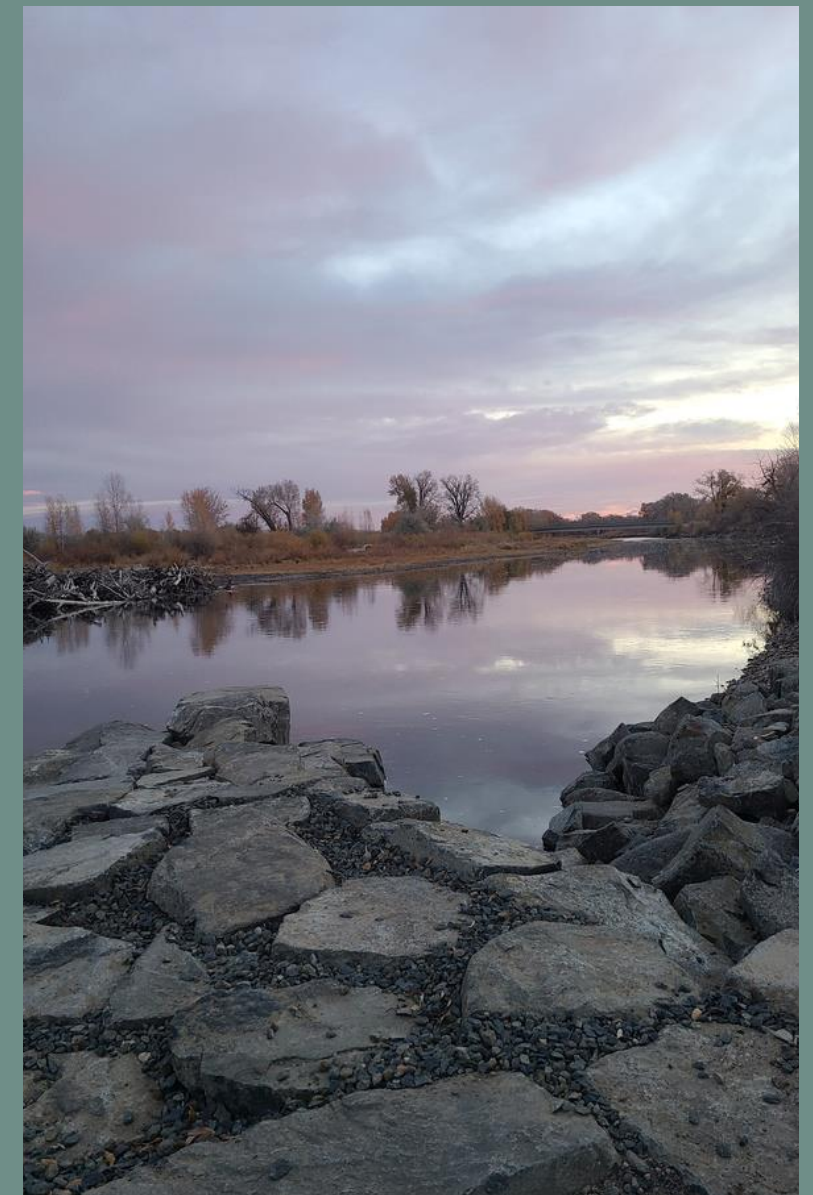
WHAT WE ARE WORKING ON

- Office Space/mobile locations
- General Operating and Start Up Funds, Fiscal Agents
 - Working with local governments for funding and support
 - Local foundations, donors and grants
 - Banking needs
- Closing the balance for year end with MRH
- Benefits for all staff, recognizing HealthCare is a big deal
- HR and Accounting Needs contract and start dates
- Board of Directors- for Operational Oversight Status
- IRS -1023, SOS tax exempt status and SAM.gov
- ACTSS social media

ADVOCATES- CRISIS, TRAUMA & SURVIVOR
SERVICES
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OPEN HEART ADVOCATES

“Never doubt that a small group of thoughtful, committed, citizens can change the world. Indeed, it is the only thing that ever has.”

— Margaret Mead



FINANCIALS: DIRECT COSTS

COSTS

- Current cost per month is \$67-\$74K/monthly
- YTD thru July 23, total is \$524, 578, projected EOY Cost is \$948,000
- YTD costs for Staff \$303,627 in salary and \$123,045 in benefits, projected EOY \$559,000 in salaries, \$221,000 in benefits
- YTD in General Operating \$97,987 , Projected EOY \$167,000

FUNDING

- Current funding YTD \$426,222
- Projected EOY funding \$873,000
- Current gap projected \$75,000 due to large increase in healthcare costs and rise in general operating with transition

CCMRH-OHA 3170 MORS FY23 JULY					
SAFETY TO CONNECTION, CREATING COMMUNITY					
	OHA MORS*	OHA MORS*	3170	3170	NOTES*
	JUL	YTD	GEN OP	YTD	
ASSET Disposal		\$5,800.00		\$5,800.00	
Other Revenue	\$1,727.00	\$6,272.00	\$1,727.00	\$6,272.00	
Donations	\$6,550.00	\$39,169.00	\$6,550.00	\$39,169.00	
Operating Revenue	\$30,260.00	\$374,981.00	\$30,260.00	\$374,981.00	
Total Operating Revenue	\$38,537.00	\$426,222.00	\$38,537.00	\$426,222.00	
EXPENSES:					
Salary	\$40,164.00	\$303,627.00	\$28,009.00	\$287,110.00	
ACCURAL			\$8,154.00	\$8,154.00	ACCURAL FOR ALL DEPTS
UNALLOWABLE GRANTS SALARY-PTO Cash OUTS and AOC			\$4,001.00	\$8,363.00	\$4001 PTO Ccashouts
Benefits	\$11,087.00	\$123,054.00	\$4,908.00	\$51,680.00	Includes ACCURAL amount
UNALLOWABLE GRANTS HEALTHCARE			\$6,179.00	\$71,374.00	
Purchased Services	\$419.00	\$3,081.00	\$419.00	\$3,081.00	
Supplies	\$111.00	\$5,234.00	\$111.00	\$5,234.00	
Minor Equipment	\$0.00	\$4,894.00	\$0.00	\$4,894.00	
Utilities	\$506.00	\$5,768.00	\$506.00	\$5,768.00	
Telephone	\$200.00	\$1,632.00	\$200.00	\$1,632.00	
Repairs & Maintenance	\$0.00	\$51.00	\$0.00	\$51.00	
UNALLOWABLE GRANTS FY23 Lease and Rental	\$3,000.00	\$18,848.00	\$3,000.00	\$18,848.00	
Insurance	\$1,614.00	\$11,176.00	\$1,614.00	\$11,176.00	
Travel & Education	\$549.00	\$6,866.00	\$549.00	\$6,866.00	
License & Dues	\$417.00	\$1,242.00	\$417.00	\$1,242.00	
Misc-Client	\$8,463.00	\$34,424.00	\$8,463.00	\$34,424.00	
Depreciation	\$470.00	\$3,830.00	\$470.00	\$3,830.00	
AMOR	\$170.00	\$851.00	\$170.00	\$851.00	
Total Expenses	\$67,170.00	\$524,578.00	\$67,170.00	\$524,578.00	
Net Income (Loss) accumulated	-\$28,633.00	-\$98,356.00	-\$28,633.00	-\$98,356.00	
TRAINING FEES INKIND-MRH only			\$14,904.00	\$16,404.00	All training must be at fair market value , and must be accounted for per Regulations, that are not covered by funding
TOTAL MARGIN OHA YTD	-\$28,633.00	-\$98,356.00	-\$13,729.00	-\$81,952.00	adjusted for training given



REVENUE AND GAPS

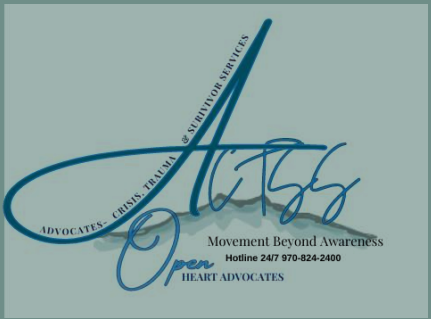
OHA-FY23 Funding			
EXPENSES	COST	REVENUE	GAPS
SALARY	\$559,000.00	\$559,000.00	\$0.00
BENEFITS	\$221,000.00	\$182,000.00	\$39,000.00
General Operating	\$113,500.00	\$77,500.00	\$36,000.00
Client/Shelter	\$54,500.00	\$54,500.00	\$0.00
TOTAL	\$948,000.00	\$873,000.00	\$75,000.00



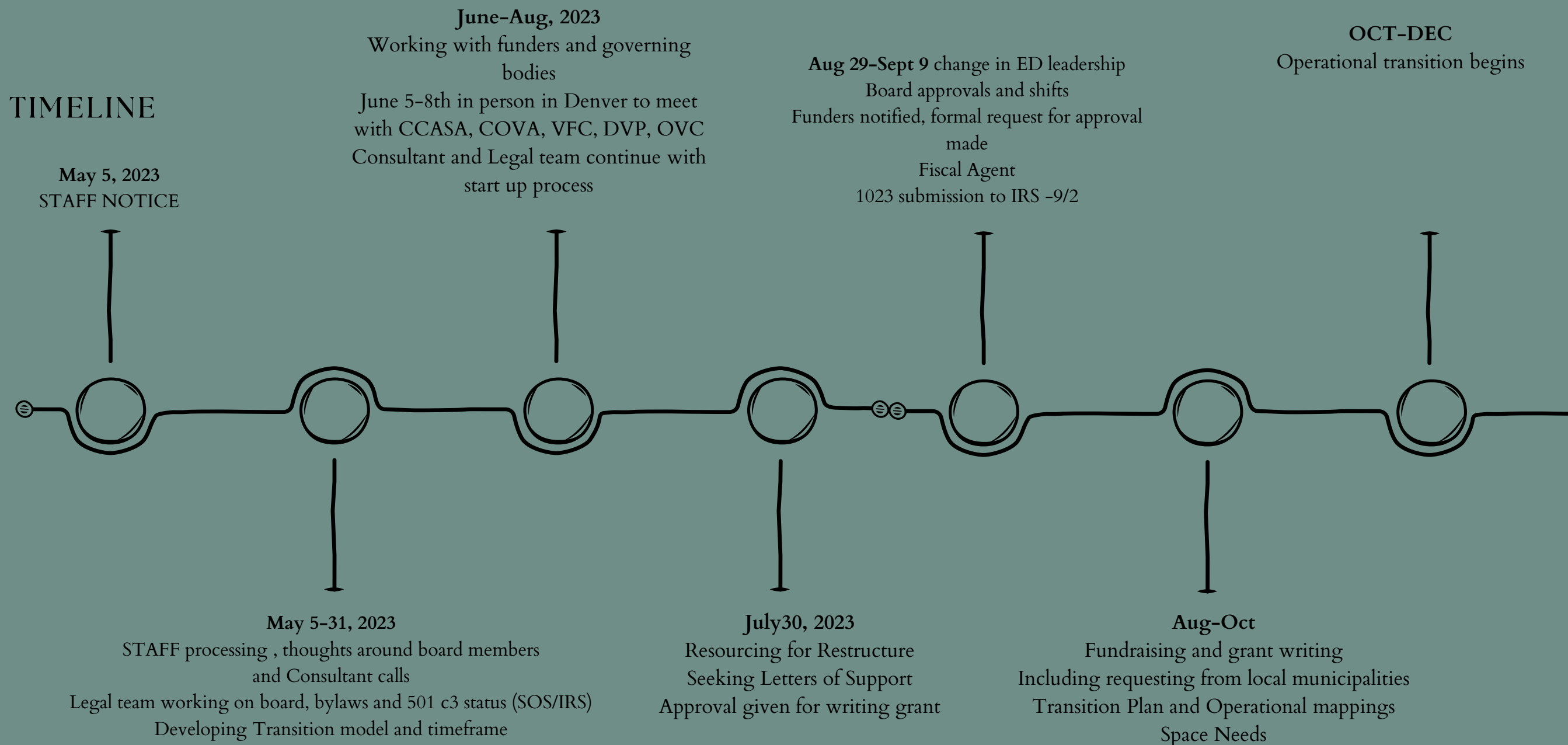
OHA- REVENUE	ITALIC is SUBMITTED/WRITTEN FOR
FUNDING SOURCES	CURRENT YEAR
FEDERAL /STATE GRANTS	
CVS/VOCA	\$222,245.00
AT WITS End/DCJ	\$226,000.00
BHA/DOJ	
DVP	\$107,796.00
COSHI	\$25,000.00
RCORP-14	\$14,999.00
RCORP-BH	\$42,000.00
DVP Flex	\$40,000.00
DVP COVID/MOVERS	\$9,855.00
CO-ARPA	\$10,000.00
Peer	<i>\$15,000.00</i>
LOCAL/FOUNDATIONAL GRANTS	
VALE-14	\$60,000.00
UNITED WAY	\$16,000.00
Youth UW	\$2,000.00
YVCF	\$50,000.00
Youth Roots	\$5,000.00
Rocky Mountain Health Foundation	<i>\$50,000.00</i>
CHAFA	<i>\$5,000.00</i>
LMD	<i>in process</i>
MCHRC	\$2,500.00
Others	<i>\$20,000.00</i>
INCOME-OTHER	
Trainings	\$3,500.00
DONATIONS/FUNDRAISERS	
Donations	\$34,000.00
Denim Days	\$2,275.00
Whittle the Wood	\$0.00
Colorado Gives	\$0.00
KRAI Drive	<i>\$5,000.00</i>
EVAW-Event	<i>\$1,500.00</i>
YVCF-Donors	<i>\$10,000.00</i>
City Craig	<i>requesting</i>
RioBlanco	<i>requesting</i>
Moffat County	<i>requesting</i>
INKIND	
MCSO	\$6,000.00
Craig PD	\$1,000.00
Moffat County	\$20,000.00
ST Michaels	\$2,500.00
TRAINING	\$16,404.00
TOTAL SECURED nnot including inkind	\$873,170.00
TOTAL REVENUE not including in kind	\$979,670.00



NEXT STEPS



TIMELINE



THANK YOU FOR
LISTENING FIRST
AND NOW HERE
FOR ALL THE
QUESTIONS,
CONCERNS, AND
SOLUTIONS



OUR 4 AGREEMENTS

- WE HONOR THAT CHANGE CAN BE AND OFTEN IS: HARD, MESSY, SCARY, EXCITING, VULNERABLE, ANXIOUS, STRESSFUL, AN ADRENALINE RUSH, AND A MILLION OTHER FEELINGS. YOUR FEELINGS ARE VALID. WE ARE HERE TO SUPPORT THAT PROCESSING WITH YOU, AND PROVIDE RESOURCES AS NEEDED FOR THAT.
- WE WILL PROVIDE AND ACCEPT TRANSPARENT, CLEAR, CONSISTENT COMMUNICATION
- WE WILL BE ACCOUNTABLE AND ACRTI FOCUSED IN OUR SOLUTIONS AND DECISIONS
- WE WILL COME FROM A GROWTH MINDSET TO EMBRACE SUSTAINABLE ABUNDANCE

