




KENAI PENINSULA BOROUGH GRANTS MANAGEMENT

M E M O R A N D U M

TO: Mike Navarre, Mayor
FROM: Brenda Ahlberg, Community & Fiscal Projects Manager 
DATE: 17 April 2015
SUBJECT: FY15-3Q Senior Grant Narrative Reports

The following senior grant reports have been submitted for FY15 third quarter:

- Anchor Point Senior Citizens
- Cooper Landing Senior Citizens
- Forget-Me-Not Center
- Homer Senior Center (no report received at this time)
- Kenai Senior Citizens (courtesy narrative)
- Nikiski Senior Citizens
- Seldovia Senior Center
- Seward Seniors Citizens
- Soldotna Senior Citizens
- Sterling Area Senior Citizens (report to be resubmitted with corrections)

The following centers closed FY15 grant obligations earlier in the year, and no additional reporting is required:

- Homer Friendship Center
- Kenai Senior Citizens
- Ninilchik Senior Citizens

Desk audits were conducted at the following centers during the third quarter:

- Cooper Landing Senior Citizens
- Forget-Me-Not Center
- Seldovia Senior Citizens



KENAI PENINSULA BOROUGH
144 North Binkley Street • Soldotna, Alaska 99669-7599
PHONE: (907) 714-2153 • FAX: (907) 714-2377
EMAIL: bahlberg@borough.kenai.ak.us

GRANTS
MAR 31 2015
RECEIVED

FROM: Anchor Point Senior Citizens, Inc.
KPB ACCOUNT: 100.62110.ANCSR.43011

Award Amount: \$44,869
Ending: 30 June 2015

Financial / Progress Report

Submit Report To:

Project Name: FY15 Senior Grant Program

Brenda Ahlberg

Date: March 25, 2015

Community & Fiscal Projects Manager

Report No.: 3

Kenai Peninsula Borough

Quarter From: January 1, 2015

144 N. Binkley St., Soldotna, AK 99669

To: March 31, 2015

FINANCIAL REPORT: FINAL REPORT DUE ON OR BEFORE 15 JULY 2015

Cost Category	Authorized Budget	Expenditures from Last Report	Expenditures This Period	Total Expenditures to Date	Balance of Funds
Personnel	23,369.00	11,130.56	6,397.62	17,528.18	\$ 5,840.82
Utilities	16,000.00	9,291.15	4,829.09	14,120.24	\$ 1,879.76
Contractual	5,500.00	870.12	2,649.83	3,519.95	\$ 1,980.05
		-	-	-	
		-	-	-	\$ -
		-	-	-	\$ -
TOTALS	\$ 44,869.00	21,291.83	\$ 13,876.54	\$ 35,168.37	\$ 9,700.63

Payment Request

\$ 13,876.54

PROGRESS REPORT: Describe activities that have occurred during this reporting period. Describe any challenges you may have experienced, any foreseen problems, and/or any special requests. Attach additional pages.

The Anchor Point Senior Center has Bingo with concessions every Friday night. We had a 3 day bingo March 6, 7, & 8. We have dinner every Thursday night and a once a month all you can eat breakfast. We have a morning exercise class twice a week and a Wednesday evening yoga class. We have a caregiver meeting the 3rd Tuesday of each month and a beautician coming in every other week for haircuts. We have games and puzzles, Wii, cards and pool table for anyone who would like to play Monday through Friday and a once a month Quilter group get together that is open to the public. We started having a Caregiver Meeting every 3rd Tuesday of the month and also Independent Living comes in the 2nd Thursday of the month to help with Medicare, Senior Services and Social Security questions.

Grantee Certification: I certify that the above information is true and correct, and that expenditures have been made for the purpose of, and in accordance with, applicable grant agreement terms and conditions.

Signature:

Roberta Ness

Date:

March 25, 2015

Printed Name and Title:

Roberta Ness, President Board of Directors



KENAI PENINSULA BOROUGH

144 North Binkley Street • Soldotna, Alaska 99669-7599

PHONE: (907) 714-2153 • FAX: (907) 714-2377

EMAIL: bahlberg@borough.kenai.ak.us

FROM: Cooper Landing Senior Citizens Corp., Inc.
KPB ACCOUNT: 100.62115.CLSEN.43011

Award Amount: \$18,665
Ending: 30 June 2015

Financial / Progress Report

Submit Report To:

Brenda Ahlberg

Community & Fiscal Projects Manager

Kenai Peninsula Borough

144 N. Binkley St., Soldotna, AK 99669

Project Name: FY15 Senior Grant Program

Date: April 2, 2015

Report No.: Three (3)

Quarter From: January 1, 2015

To: March 31, 2015

GRANTS

APR 14 2015

RECEIVED

FINANCIAL REPORT: FINAL REPORT DUE ON OR BEFORE 15 JULY 2015

Cost Category	Authorized Budget	Expenditures from Last Report	Expenditures This Period	Total Expenditures to Date	Balance of Funds
	\$ 18,665.00				
Personnel		8,194.50	2,857.50	11,052.00	\$ (11,052.00)
Transportation		1,835.84	696.60	2,532.44	\$ (2,532.44)
Insurance		-	165.00	165.00	\$ (165.00)
Utilities		826.79	391.27	1,218.06	\$ (1,218.06)
Supplies/Equipment		82.14	269.79	351.93	\$ (351.93)
		-	-	-	\$ -
TOTALS	\$ 18,665.00	10,939.27	\$ 4,380.16	\$ 15,319.43	\$ 3,345.57

Payment Request \$ 4,380.16

PROGRESS REPORT: Describe activities that have occurred during this reporting period. Describe any challenges you may have experienced, any foreseen problems, and/or any special requests. Attach additional pages.

This third quarterly report for FY2015 reflects the ongoing support for senior services in Cooper Landing. As usual, personnel costs are associated with administrative services including bookkeeping and clerical needs. Transportation costs are related to fuel and repairs on our two buses required to meet the needs of the seniors such as keeping medical appointments, shopping and various volunteer functions in the community. Utility and supply costs serve to ensure the physical operation of the office.

Photos included in the mailed narrative depict several activities this quarter as noted on the revers sides; bust trip to the play "Joseph and the Technicolor Dreamcoat" in Soldotna; memorial gathering for 99 year old Dean Birmley; activities related to keeping Snug Harbor Haven housing operational; and a bust trip to Moose Pass to participate in transfer site cleanup with other seniors from Seward.

Repara rec'd 04/14/15; corrections rec'd 04/17/15.

Grantee Certification: I certify that the above information is true and correct, and that expenditures have been made for the purpose of, and in accordance with, applicable grant agreement terms and conditions.

Signature: Submitted electronically

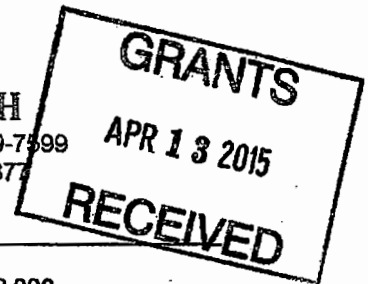
Date: Correction received 04/17/2015

Printed Name and Title: Ronald Sloan, President



KENAI PENINSULA BOROUGH

144 North Binkley Street • Soldotna, Alaska 99669-7599
PHONE: (907) 714-2153 • FAX: (907) 714-2377
EMAIL: bahlberg@borough.kenai.ak.us



FROM: [...] dba Forget-Me-Not Center
KPB ACCOUNT: 100.62195.FNTCO.43011

Award Amount: \$33,000
Ending: 30 June 2015

Financial / Progress Report

Submit Report To:

Brenda Ahlberg

Community & Fiscal Projects Manager

Kenai Peninsula Borough

144 N. Binkley St., Soldotna, AK 99669

Project Name: FY15 Senior Grant - Adult Daycare Prgm

Date: 03/31/15

Report No.: 3

Quarter From: 01/01/15

To: 03/31/15

FINANCIAL REPORT: FINAL REPORT DUE ON OR BEFORE 15 JULY 2015

Cost Category	Authorized Budget	Expenditures from Last Report	Expenditures This Period	Total Expenditures to Date	Balance of Funds
Personnel	\$ 22,000.00	\$ 9,707.14	\$ 8,463.85	\$ 18,170.99	\$ 3,829.01
Training	\$ 1,500.00	\$ 1,500.00	\$ -	\$ 1,500.00	\$ -
Supplies	\$ 9,545.00	\$ 915.10	\$ 7,639.56	\$ 8,554.66	\$ 990.34
TOTALS	\$ 33,045.00	\$ 12,122.24	\$ 16,103.41	\$ 28,225.65	\$ 4,819.35

Payment Request	\$ 16,103.41
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PROGRESS REPORT: Describe activities that have occurred during this reporting period. Describe any challenges you may have experienced, any foreseen problems, and/or any special requests. Attach additional pages.

The third quarter of FY 2015 brought continuance to the Forget-Me-Not Adult Day program focused on The Active Living approach, with elders expressing enjoyment of attending Forget-Me-Not and participating in the stimulating and engaging activities. Friendships are developing among the elders, along with more reminiscing and interactions with their peers and staff. We have experienced sorrow at the passing of one elder and enjoyment of one new elder attending, and provided three (3) trial days for prospective participants.

Mary Sharp of the Edcon Group continued to provide monthly support to the staff. With the training that Mary has provided in regards to implementing music into our activities and creating individualized playlists for the elders, Forget-Me-Not programming has created music activities, such as Music Twister, Memory Music Concentration, Music Jeopardy, Silly Song Bingo, and they have become a great success with the elders. They look forward and express excitement towards these activities. Forget-Me-Not has become a resource for Mary, as she gathers ideas that are working for Forget-Me-Not and includes them in her trainings for other programs.

Cathy Stingley of Thoughtful Therapies continues to provide monthly trainings for the Forget-Me-Not staff and conducts movement activities with the elders. She provides exciting new ideas,

expresses enthusiasm for the staff and demonstrates how to fully engage the elders in the movement activities.

Monthly the Forget-Me-Not Adult Day program is reaching out to the senior population by publishing a community resource flier, hosting events and providing activities at the center and out in the community to help the elders stay involved.

January the program manager traveled to Juneau, to participate in a 3-day training for Frontline Supervisors in Human Services. Information from this training was applied to the Forget-Me-Not Adult Day program, providing a team approach to care, planning and implementing activities. The team reviews individual care plans quarterly to capture the many changes that occur in our aging population.

In February, children from Kaleidoscope Elementary School presented a Valentine's Day program with singing and dancing for the elders at the Forget-Me-Not center. The elders enjoyed the interactions with the children, especially when the children presented each one of them with a valentine card that they had created.

March was celebrated with the Girl Scouts attending Forget-Me-Not and enjoying a Tea Party and refreshments with the elders. The Elders taught the girls proper "Afternoon Tea" etiquette, and both generations enjoyed participating in several activities together.

During the next quarter Forget-Me-Not will continue the ongoing goal of being more involved in the community by participating in activities with other elders outside of the center, focusing on outreach, stimulation and encouragement to attend. Forget-Me-Not goals for this upcoming quarter will be the same as the prior quarter, with one additional goal: 1) Focus on elders who do not have natural support's in place to educate and assist them on obtaining services and funding sources that are available to them; 2) Continue to enhance and refine lesson planning activities to incorporate strategies and theories that Mary Sharp and Cathy Stingley have provided; 3) Implement more support to the family members and caregivers by providing a monthly meeting that will include individuals in the community.

Grantee Certification: I certify that the above information is true and correct, and that expenditures have been made for the purpose of, and in accordance with, applicable grant agreement terms and conditions.

Signature: _____

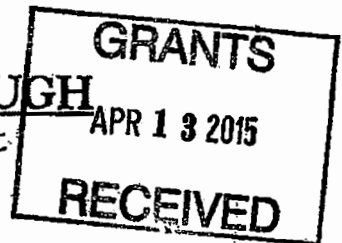
Date: _____

Printed Name and Title: _____

Amanda Faulkner *4/13/15*
Amanda Faulkner, Executive Director



KENAI PENINSULA BOROUGH
Financial / Progress Report



FROM: City of Kenai
KPB ACCOUNT: 100.62130.KENSR.43011

Contract Amount: \$126,207
Ending: 03/31/2015

Submit Report To:

Brenda Ahlberg

Community & Fiscal Projects Manager

Kenai Peninsula Borough

144 N. Binkley St., Soldotna, AK 99669

Project Name: KPB Senior Grant Program

Date: 04/01/2015

Report No.: #3

Quarter From: 01/01/2015

To: 03/31/2015

FINANCIAL REPORT: Attach the expenditure statement by fund, indicating the grant revenue and approved budget expenditures year-to-date for this report.

Cost Category	Authorized Budget	Expenditures from Last Report	Expenditures This Period	Total Expenditures to Date	Balance of Funds
Personnel	73,633.00	73,633.00	.00	73,633.00	.00
Travel	938.93	938.93	.00	938.93	.00
Facility/Other	26,055.07	26,055.07	.00	26,055.07	.00
Supplies	25,580.00	25,580.00	.00	25,580.00	.00
TOTALS	126,207.00	115,267.74	.00	126,207.00	.00
Funds Requested for Reimbursement					.00

PROGRESS REPORT: Describe activities that have occurred during this reporting period. Include challenges experienced, any foreseen problems, and/or any special requests. Attach additional pages if necessary.

Grantee Certification: I certify that the above information is true and correct, and that expenditures have been made for the purpose of, and in accordance with, applicable grant agreement terms and conditions.

Signature:

Date:

04/02/15

Printed Name/Title: Terry Eubank, Finance Director

City of Kenai-Kenai Senior Services
Progress Report to Kenai Peninsula Borough
2nd Quarter Progress Report ending March 31, 2015

This quarter, the Director attended two City Council Meetings, facilitated two Council on Aging Meetings, attended three Senior Connection, Inc (fundraising arm of the senior center) Meetings, attended two City Council Meetings, six City Department Head Meetings, one Special session department head meeting concerning the City-Wide Job Classification Study, completed the RFP for the Nutrition, Transportation, and Services Grant, completed the Borough Grant Application, and began writing the RFP for United Way Grant which was due the 1st week in April. In January reviewed the current budget and assisted the City Manager in preparation of the 201-2016 budget, and attended Dept. Budget Meeting. She attended two AgeNet teleconferences this quarter. AgeNet is the senior center's advocacy group within the state.

The Director held three Senior Center Staff Meetings. One meeting included a workshop open to community and seniors on "5 Wishes" facilitated by the Hospice on the Peninsula. The "5 Wishes" workshop focused on end of life issues, how to prepare and have a compassionate dialogue with your loved ones.

This half of the year the Director supervised two Kenai Peninsula College Human Services Students. One student had a twenty hour practicum and the other had a 120 hour practicum. The latter student will graduate in human services in May. This semester we were also fortunate to have a high school student in the kitchen who wanted to learn culinary arts skills. The Director, Cook and the instructor at Kenai High School worked together to provide the high school senior with two hours daily of culinary hands on training.

The Director supervises three MASST (Mature Alaskans Seeking Skills Training) Trainees. One works in the Activity Department. She is learning English as she speaks Russian. This person has been with us for the past two years, her English has improved significantly. Currently, she reads the Peninsula Clarion with one of the seniors that frequents the center daily. She improves her verbal English and he learns more Russian by the two of them reading the paper out loud to each other, then discussing what each read.

Kenai Senior Connection, Inc. held their annual "March for Meals" Fundraiser for the Center. The staff along with the Board Members of Senior Connection, Inc. were involved to making sure this was a success, i.e. cooking food, producing fundraising mail out, making posters, selling tickets, lining up silent auction items as well as the homemade pies to be auctioned off. It was a very successful fundraiser! The funds raised was for the home meal program and touches many frail seniors who are homebound and cannot get out. This is one of the vital programs we provide at the center. Last fiscal year we served 25,882 home meals. During the past quarter, we served 5,912 home meals.

This past quarter the facility was rented once, we held the City-Wide Employee Appreciation Party, and provided space for a "Celebration of Life" Service. The end of March, Kenai Senior Connection, Inc. sponsored the Kenai Central High School "After Prom Breakfast." Volunteer seniors were at the senior center in the middle of the night to prepare a breakfast buffet and served it to 150 junior-senior high students at the end of the Prom event. This is one of the senior's favorite yearly events.

This past quarter we had 91 volunteers that gave 1,878 service hours. They provided daily tasks as well as assisted with 27 special events this quarter. We cherish our volunteers and could not have the program we do without them! They are truly a blessing!

Our Activity Program continues to grow by leaps and bounds. Below are some statistics that reflect the growth of the activity program.

In the monthly senior center "Centerline" newsletter, we featured various seniors and stories about their lives. One man, moved recently into the senior housing from his homestead of 35 years. The past quarter was a major adjustment period from his homestead to an apartment style-living. The Activity-volunteer Coordinator discovered he enjoyed writing. She asked to read a couple of his stories, then asked if we could publish one in the "Centerline". Through the warm reception of his stories from other seniors and discussion among staff we found a volunteer that was eager to start a writing group. At the beginning of the quarter, we began our group with five seniors, at the end of the quarter we now have nine seniors in the writing group that participated 12 times this quarter. The group is growing strong, they have created a book of their writings that has been placed in the fireplace room, so seniors can sit, read and wait for their ride home and enjoy the stories and poems as well as reading a featured "writer of the month" in the Senior center newsletter.

The First Baptist Church sponsored the Valentine's Dinner that was held in the evening. The event was a wonderful collaboration between the two organizations. The church members wanted to show the young people in their church that it is possible to stay married to the same person. We took that theme of celebrating unions of 50+ years and recognized 25 couples that had been married 50+ years and 10 couples that celebrated 60+ years. A video was shared of couples answering questions as to how they met, stayed married for as long as they have and advice to young couples today. The youth of the church participated in decorating the dining room, serving the dinner and helped with clean up. There were 145 seniors that participated in this evening event. Staff and church members have decided to make this an annual event. It was a great success!

During a staff meeting we held a workshop for staff, volunteers and seniors on the "5 Wishes" sponsored by Hospice. It was led by the Director, Gayle Robinson of Hospice. There were 30 attendees that were able to learn how to make their end of life wishes known. There is a booklet that guides you through the process and encourages family discussion about end of life issues.

The Spanish Class began two years ago. The participation numbers have grown in the past two years. Currently we have nine participants and two new members. The original group has split off into two groups, beginning and a more advanced group. Both are held in the afternoon. Recently a pinochle player approached the activity-volunteer coordinator and mentioned that he would like to participate in Spanish but it was at the same time as he played pinochle. Another Spanish class began in the morning. We had 3 participants. The pinochle player that was in attendance, then stayed for lunch for the first time and afterward attended his regular pinochle game. After pinochle, three people stayed afterward and visited, laughed and told stories for 45 more minutes.

We have grown in the amount of meals we serve but we are growing in programs as well. Seniors used to come for just lunch, maybe shopping and or cards. Now they

are making choices of lunch, cards, Spanish, writing class, guitar lesson, exercise or an iPad Class. We are serving our purpose when we can empower the seniors to choose a class they desire to attend, to come to lunch, socialize, and enjoy being with their peers and learning!

During this quarter, 1,335 seniors participated in 36 "One-Time Event" opportunities. Some of these events were: "Clean up Your Computer Day", "Cabin Fever Card Tournament", "National Tortilla Day", "National Popcorn Day", "National Kazoo Day", "Super Bowl Party", "Old Stuff Swap," and "Johnny Appleseed Day," to name a few.

February Fridays are Waffle Breakfast Fridays. We served a "waffle breakfast" on Fridays in February and served 65 seniors.

This quarter, in the physical wellness program at the senior center: there were 83 seniors with two new participants, participated in blood pressure checks. There were 16 opportunities to have your blood pressure monitored. One senior was referred to his/her physician, eight seniors were monitoring to take their readings to a regular physician's appointment. There were 15 participants that participated in 35 classes of aerobics (Richard Simmons movement tape), 31 participated 33 times in the weight resistance class, "Growing Stronger." 13 line dancers practiced and entertained in the community 27 times. Tai Chi had 16 participants that had 25 opportunities, with six new participants. Three seniors participated in Zumba 25 times. The water walking group that travels twice a week to the Nikiski Pool during early morning hours had 13 participants that water walked 16 times. Nordic Walking at the Rec. Center had three participants and they walked 32 times during the quarter.

We have 13 seniors who participated 13 times in Bell Class. They practice once a week and entertain at least once a month. 7 seniors participated in 13 guitar classes this quarter, 16 seniors participated twice this quarter in "Singspiration" with 5 of those being new participants. There were 83 participants at evening Blue Grass and there were 10 opportunities to participate. The 83 participants include the musicians and those that come to enjoy the music!

6 senior women participated 13 times doing beading. They make jewelry and learn from one another. 9 senior women met once a week 10 times this quarter and participated in the knitting and crocheting group.

15 seniors looked forward to "Dog Therapy" once a week during the quarter. Two trained Shelties provided 12 opportunities to enjoy animal companionship.

This quarter, 149 seniors participated 13 times in an after lunch Bing. 16 bridge players played twice a week this quarter at the senior center, 25 seniors participated 23 times playing pinochle, and 16 seniors enjoyed dominos 12 times this quarter. 4 senior women were faithful at their tripoli game and played 12 times this quarter.

This quarter, in the early morning, 35 seniors socialized and enjoyed coffee, donuts and current events. Many of these are men that have walked at Wal-Mart or exercised at the rec. center. There were 61 opportunities for this activity.

As you see, we are a multi-service facility. We serve our seniors and try to provide activities they want to participate in! We growing. It is great to have them take part, but it is wonderful to have them make suggestions as to what kind of activities/programs they want to have at the center.

The outreach worker visited 97 seniors in their home, escorted to medical appointments, visited in assisted living homes, nursing homes, and during lunch at the senior center. She also led the knitting and crocheting class.

This past quarter we served:

3,553 Congregate Meals

5,912 Home Meals

We have two part-time drivers and one volunteer driver. The volunteer driver delivers home meals once a week to Kasilof. We currently have 12 seniors that we provide home meals to in the Kasilof area.



KENAI PENINSULA BOROUGH
144 North Binkley Street • Soldotna, Alaska 99669-7541
PHONE: (907) 714-2153 • FAX: (907) 714-2377
EMAIL: bahlberg@borough.kenai.ak.us

GRANTS

APR 10 2015

RECEIVED

FROM: City of Seldovia dba Seldovia Senior Center
KPB ACCOUNT: 100.62160.SELDO.43011

Award Amount: \$10,770
Ending: 30 June 2015

Financial / Progress Report

Submit Report To:

Project Name: FY15 Senior Grant Program

Brenda Ahiberg

Date: April 10, 2015

Community & Fiscal Projects Manager

Report No.: 3

Kenai Peninsula Borough

Quarter From: 1/1/15

144 N. Binkley St., Soldotna, AK 99669

To: 3/31/15

FINANCIAL REPORT:

FINAL REPORT DUE ON OR BEFORE 15 JULY 2015

FINAL RPT Jaz

Cost Category	Authorized Budget	Expenditures from Last Report	Expenditures This Period	Total Expenditures to Date	Balance of Funds
Personnel		-	-		\$ -
Transportation		-	-	-	\$ -
Contractual		-	-	-	\$ -
Supplies	10770.00	9,287.01	1,482.99	10,770.00	\$ -
Equipment		-	-	-	\$ -
		-	-	-	\$ -
TOTALS	\$ 10,770.00	9,287.01	\$ 1,482.99	\$ 10,770.00	\$ -

PROGRESS REPORT: Describe activities that have occurred during this reporting period. Describe any challenges you may have experienced, any foreseen problems, and/or any special requests. Attach additional pages.

We continue to serve three meals a week to our senior community. Our attendance numbers are increasing, thus the need for more supplies (food) is also increasing. With the increase in the numbers of meals served and the costs for supplies increasing, the funds are not going as far as they used to. We are exploring ways to tighten our budget and make our dollars go further. We are happy that the program continues to be so popular and important to our community; so many depend on these meals.

Since we have expended all funds in this grant, please accept this as our final report for FY2015.

Grantee Certification: I certify that the above information is true and correct, and that expenditures have been made for the purpose of, and in accordance with, applicable grant agreement terms and conditions.

Signature: *Cassidi Little*
Printed Name and Title: Cassidi Little, Treasurer

Date: April 10, 2015



KENAI PENINSULA BOROUGH
144 North Binkley Street • Soldotna, Alaska 99669-7599
PHONE: (907) 714-2153 • FAX: (907) 714-2377
EMAIL: bahlberg@borough.kenai.ak.us

GRANTS

APR 14 2015

RECEIVED

FROM: Seward Senior Citizens
KPB ACCOUNT: 100.62150.SEWSR.43011

Award Amount: \$47,238
Ending: June 30, 2015

Financial / Progress Report

Submit Report To:

Brenda Ahlberg

Community & Fiscal Projects Manager

Kenai Peninsula Borough

144 N. Binkley St., Soldotna, AK 99669

Project Name: FY15 Senior Grant Program

Date: 04/14/2015

Report No.: FY15, Qtr 3

Quarter From: January 1, 2015

To: March 31, 2015

FINANCIAL REPORT: FINAL REPORT DUE ON OR BEFORE 15 JULY 2015

Cost Category	Authorized Budget	Expenditures from Last Report	Expenditures This Period	Total Expenditures to Date	Balance of Funds
Personnel	35,000.00	8,750.04	8,750.04	26,250.12	\$ 8,749.88
Transportation					\$ -
Contractual	5,000.00	1,249.98	1,249.98	3,749.94	\$ 1,250.06
Supplies	7,238.00	1,809.48	1,809.48	5,428.44	\$ 1,809.56
Equipment					\$ -
Facility/Utilities					\$ -
TOTALS	\$ 47,238.00		\$ 11,809.50	\$ 35,428.50	\$ 11,809.50

Payment Request \$ 11,809.50

PROGRESS REPORT: Describe activities that have occurred during this reporting period. Describe any challenges you may have experienced, any foreseen problems, and/or any special requests. Attach additional pages.

The Seward Senior Center provided 450 meals on wheels, 1100 meals in dining room services, 380 one way rides in unassisted transportation, 28 health promotion classes including: weight and strength training, tai chi, core balance, and Wii bowling. Staff performed as Medicare, Social Security, and Medicaid counselors to more than 12 seniors, which provides seniors with accessible information and access to benefits otherwise gone without, due to lack of information or technology. The center relies on other community human resource agencies to assist supporting the senior community of Seward.

We are encouraged by the KPB efforts in supporting senior services across the Peninsula and strive to provide unduplicated and essential services to those in the greatest need in our senior community.

Thank you!

Grantee Certification: I certify that the above information is true and correct, and that expenditures have been made for the purpose of, and in accordance with, applicable grant agreement terms and conditions.

Signature: Dana Paperman **Date:** April 13, 2015

Printed Name and Title: Dana Paperman, Executive Director

Submitted electronically
[Signature]



KENAI PENINSULA BOROUGH
144 North Binkley Street • Soldotna, Alaska 99669-7599
PHONE: (907) 714-2153 • **FAX:** (907) 714-2377
EMAIL: bahlberg@kpb.us

FROM: Soldotna Area Senior Citizens, Inc.
KPB ACCOUNT: 100,62170.SOLSR.43011

Award Amount: \$90,886
Ending: 30 June 2015

Financial / Progress Report

Submit Report To:

Project Name: FY15 Senior Grant Program

Brenda Ahlberg

Date: 4/3/15

Community & Fiscal Projects Manager

Report No.: 3

Kenai Peninsula Borough

Quarter From: 1/1/15

144 N. Binkley St., Soldotna, AK 99669

To: 3/31/15

GRANTS

APR 03 2015

RECEIVED

FINANCIAL REPORT:

FINAL REPORT DUE ON OR BEFORE 15 JULY 2015

Cost Category	Authorized Budget	Expenditures from Last Report	Expenditures This Period	Total Expenditures to Date	Balance of Funds
Personnel	\$74,304.00	54,182.12	20,121.88	74,304.00	\$ -
Utilities	\$16,582.00	11,912.07	4,669.93	16,582.00	\$ -
		-	-	-	\$ -
TOTALS	\$ 90,886.00	66,094.19	\$ 24,791.81	\$ 90,886.00	\$ -

Payment Request **\$ 24,791.81**

PROGRESS REPORT: Describe activities that have occurred during this reporting period. Describe any challenges you may have experienced, any foreseen problems, and/or any special requests. Attach additional pages.

Provided congregate meals and home delivered meals daily; senior transportation; information and referral services; outreach to isolated, poverty level disabled homebound seniors. Due continued silt in city water supply and resultant maintenance to equipment including hot water boiler and ice maker, contracted to have complete water filtration system installed; will cost Center \$8605. Completed phase 2 of low-energy interior lighting: all interior and exterior lighting replaced: Center's cost for phase 2 was \$4300. Hosted special education student for employment training. Provided free tax filing for seniors. Converted to new GEMS reporting program for Alaska DHSS. Resolved 18month back payment issues with Medicaid managed by Xerox (major headache). Replaced 1 computer system due new accounting program requirements. Held: monthly game nights and no-host dinners; shopping trips to Safeway and Fred Meyers; Valentine dinner; St. Patrick's Day Dinner (corned beef-yum); 55 Alive Driving Course; Family Care Giving presentations and assistance through the Peninsula, 2 meetings per month at Center; completed financial audit of wages for insurance company; hosted ACOA weekly teleconferences; held Volunteer Awards Banquet to honor all our volunteers which allows this facility to provide senior services. Refabricated parts for water dispenser and cooler due parts not available.

Grantee Certification: I certify that the above information is true and correct, and that expenditures have been made for the purpose of, and in accordance with, applicable grant agreement terms and conditions.

Signature:

George Parks

Date: 4/3/15

Printed Name and Title: George Parks, President



KENAI PENINSULA BOROUGH - Grant Management Considerations
Desk or Site Review [Local Funds]

Cooper Landing Senior Center - FY15 Desk Audit 17 February 2015
Pre-arranged meeting via FaceTime at 09:00AM*

Attendance: Brenda Ahlberg, Mona Painter and Ron Sloan

Topics reviewed were personnel vs. contractual, separation of duties performed, and grant management

FY15 fiscal reports cite a similar narrative for 1Q and 2Q. Ahlberg suggested that the narrative report provide more information. The narrative is provided in the Mayor's Report after each quarter has been completed, which is submitted to the Assembly for review. Painter stated that she would take the opportunity to provide more information in the narrative including photos.

The fiscal reports list "personnel" costs; however, these expenditures are contractual. Three individuals are paid an hourly rate for the bookkeeping, administrative assisting and maintenance services. Sloan approves their time before payment is made. Sloan provided a summary of costs and example of the bookkeeping contract of services for this desk audit.

Sloan offered a sufficient separation of duties example, describing the method for ordering supplies, reconciling invoices and approving expenditure payments by different people. The agency uses QuickBooks to track expenditures and to generate reports. He also described the board's actions of reviewing revenue vs. expenditures as detailed at a monthly finance meeting. Good communication is practiced to ensure that the grant is spent as governed by KPB 5.22. The annual budget was also provided for this audit.

Record retention exceeds KPB requirements per agreement. Each report includes the support documents for expenditures.

Grantee suggestions: None. Ahlberg referenced KPB 5.22 and explained the senior grant allocation process.

*The Desk Audit for Local Funds Questionnaire was previously provided to agency 09 February 2015.



KENAI PENINSULA BOROUGH – Grant Management Considerations
Desk or Site Review [Local Funds]

Forget Me Not Adult Daycare Center – FY15 Desk Audit 11 February 2015*

Attendance: Ahlberg, Darla Peterson, Amy Hagen, Angela Clary

Topics reviewed were general program and grant management:

- The staff described the FMN program and the importance of diverse programming to meet attendees' cognitive needs. The calendar, newsletter and weekly programming documents describe the program in detail (attached).
- Peterson/Hagen understand the grant requirements and reviews budget vs. objectives on a regular basis.
- Ahlberg toured facility and has a good understanding of how this grant contributes to the program needs.

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**Forget Me Not Adult Daycare Center – FY15 Desk Audit 23 February 2015\***

Teleconference 09:00 with Ahlberg and LaRae Paxton

Topics reviewed were human resources, payroll, separation of duties, grant management:

- T/E forms are certified by immediate supervisor, which are given to Finance personnel that code and certify (clear separation of duties among staff that are responsible for coding, auditing, certifying and final approval to ED).
- HR processes new hire or change of status and submits to Finance; Finance verifies changes and sets up payroll as approved in HR documentation (clear separation).
- Purchases <\$500 must be approved by the department director (Hagen); whereas, purchases >\$500 must be approved by the ED. From PO request to AP, all actions are done by separate people.
- Record retention is a standard period of 7+ years for all grants (KPB Senior Grant record retention is three years).
- From grant application to grant management, there is clear communication between administration, finance and program manager to ensure processes are reviewed and improvements or efficiencies are made as needed when issues arise. To date, no material findings have been made from annual audit.
- Grantee suggestions: None. No questions or challenges regarding the FY15 program. Ahlberg recommended to Peterson that a brief presentation to Assembly may be scheduled through the Clerk's office. Ahlberg will email KPB Senior Grant funding history to Paxton.

\*The Desk Audit for Local Funds Questionnaire was previously provided to agency 09 February 2015.



**KENAI PENINSULA BOROUGH - Grant Management Considerations**  
Desk or Site Review [Local Funds]

Seldovia Senior Center - FY15 Desk Audit 13 February 2015  
Pre-arranged meeting via Skype at 10:30AM

Attendance: Ahlberg and Cassidi Little, CoSeldovia Finance Director

Topics reviewed were grant management and separation of duties performed.

FY15 fiscal reports lists supply costs only and are easily tracked; however, Ahlberg suggested that the narrative report provide more data, i.e. number of meals served or attendance. The narrative is provided in the Mayor's Report after each quarter has been completed, which is submitted to the Assembly for review.

Little described sufficient separation of duties, listing individuals responsible for ordering supplies, reconciling invoices and approving expenditure payments.

Agency uses QuickBooks to track grant program and to generate reports. CFO generates a regular treasurer's report, which is provided to the Senior Center staff. The report lists budget LTD actions by fund source.

Record retention exceeds KPB requirements per agreement.

Grantee suggestions: None. No questions or challenges regarding the FY15 program.