

2020 GREATER HARRISBURG COMMUNITY FOUNDATION UPSTREAM GRANT APPLICATION

DATE DUE: AUGUST 1, 2020

Thank you for applying to the Greater Harrisburg Foundation, a regional foundation of The Foundation for Enhancing Communities. Tell your story clearly and concisely. Attachments are required; follow all directions. Failure to answer questions, utilize this template, or attach required documents will disqualify your application. Answer all questions using information that applies to the project seeking support of grant funds. Contact Jennifer Strechay, Program Offer for Community Investment, at jstrechay@tfec.org or 717-236-5040 with questions.

APPLICANT PROFILE

Applicant Organization Name

Lebanon Valley Volunteers in Medicine Provide your organization's name as currently recognized by the IRS

- □ Check box if the Applicant Organization Name above is a "Doing Business As" name and the provided 501c3 letter states a different name. To be recognized by the "Doing Business As" name, attach ONE legal document using the provided name. If not provided, TFEC will utilize the 501c3 name.
- Check box if the Applicant Organization uses a Fiscal Sponsor and provide name here Click or tap here to enter text.

Name, Title, Email, Phone of Executive Leader

Richard Scott, Executive Director

All contracts and notifications of grant status will be addressed to the individual provided here

Applicant Organization's Physical Address

711 South 8th Street, Lebanon, PA 17042

Applicant Organization's Address for Mailed Communications

711 South 8th Street, Lebanon, PA 17042

All contracts and notifications of grant status will be sent to the address provided here

Name, Title, Email, Phone of Contact Completing Application

Michael D. Elder, MSW, Social Worker

If application questions arise, this individual will be contacted by TFEC staff

Organization's Mission Statement

The mission of Lebanon Valley Volunteers in Medicine to *provide free compassionate, quality health care and education for underserved members of our community.*

Organization History (Do not exceed this page)

Lebanon Valley Volunteers in Medicine (LVVIM) is a non-profit 501(C)3 organization, founded in 2009 with the purpose of offering free primary health care services to uninsured, low-income adult residents (aged 18 through 64) of Lebanon County, PA. The mission of LVVIM is "to provide free compassionate, quality health care and education for underserved members of our community".

To achieve these goals LVVIM operates an "absolutely free" health care clinic that offers scheduled appointments to our established patients and a no appointment necessary "walk-in clinic" for those with more urgent care needs.

PROJECT PROFILE

Project Title

1,000

Lebanon Valley Volunteers In Medicine's Walk-in Clinic (LVVIM)

Project Title must match title listed throughout application and online.

| Project Areas of Focus ☐ UPSTREAM GENERAL Choose UPstream General if your project utilizes upstream strategies but categories below. See the grant guidelines for additional detail. | is not principally centered upon the |
|--|--------------------------------------|
| UPSTREAM: FOCUS AREAS Choose an UPstream Focus Area (if your project is principally centered up Please select only those area(s) that apply to this project. See the grant go | |
| EDUCATION | ENVIRONMENT & PARKS |
| \square Programs & projects that focus upon or nurture access to early | ☐ Environmental stewardship |
| childhood education | \square Horticulture & the arts |
| ☐ Education & development programs for children & youth | ☐Health & environment |
| ☐ Educational programs serving adults | □Park beautification & improvement |
| HEALTH | HOMELESSNESS |
| ☐ Health & human services | ☐ Homelessness & hunger |
| □Cancer awareness and/or research | |
| ☐ Dental care for those in need | |
| | |
| □HIV & AIDS | |
| □Individuals with debilitating or terminal illness | |
| □Individuals with intellectual disabilities | |
| □Prevention of head and/or spinal cord injury | |
| □Purchasing of devices that improve accessibility | |
| MENTAL HEALTH | SENIORS |
| □Counseling for children with terminally ill family members | ☐ Programs & projects serving older |
| □Guidance, counseling, or programming that includes guidance | adults |
| and/or counseling for youths | |
| Mental health | |
| COMMUNITIES OF FOCUS | |
| ☐ Disaster relief & human services that serve the communities of Le | • |
| ☐ Programs and projects that benefit residents of Millersburg, a boro | |
| ☐ Projects to enhance Camp Hill Borough parks provided by youth o | |
| or other youth organizations; programs & projects that focus upon or education within Camp Hill. | Thurture access to early childridod |
| Counties to be served as part of project; check all that apply. | |
| | erry□ Northern York (Dillsburg Area) |
| Projected Number of Individuals to be served by project | |
| 1,000 Total number of ADULTS served | |

If above data is not appropriate to project, be sure to fully state the audience type and numbers to be served in Question 2 of the Impact Narrative.

Total number of CHILDREN (ages 17 and under) served Total number of ALL INDIVIDUALS served by the project

PROJECT SNAPSHOT

1. Capture your UPstream project and the community need it seeks to address in 200 words or less.

LVVIM was formed in response to an increasing number of residents in Lebanon County who are underserved, do not have health insurance, or lack access to health care services. In 2018, approximately 9 percent of Lebanon County (pop.: 136,000) adult residents between the age of 18 and 64 did not have health insurance and thus lacked access to primary care services. This represented 12,240 Lebanon County adult residents who lacked health insurance, lack access to primary care or access to chronic disease management services. In 2018, 9 percent of the residents of Lebanon County were living in poverty with an additional 28 percent being considered to be low-income.

Lebanon City (pop. 25,477) is a designated Medically Underserved Area/Population (MUA/P) and faces multiple economic, cultural, or linguistic barriers to health care. Nearly a third of the population of Lebanon City lives in poverty and 63 percent of the population are considered to have low to moderate levels of income. WellSpan Health - Good Samaritan Hospital sees more than 52,000 ER visits annually. Based on the population size of Lebanon County, Good Samaritan Hospital is seeing many times more ER visits than reported as the national average. Unfortunately, medically underserved communities have significantly higher rates of emergency room utilization because patients have nowhere else to go for basic primary care services.

PROJECT NARRATIVE

Answer questions 2-10 clearly and concisely; no limit.

2. The GHCF UPstream grant opportunity seeks to improve our area communities by supporting existing or new "upstream" systems, interventions, programs, or projects that attempt to create positive social change by addressing a problem at its source rather than managing its "downstream" symptoms. Describe your proposed upstream project, the geographic area it will serve, and the audience to be served; state why this audience was selected. Include how/why your project is "upstream" and how your project is working to address a specific need or needs. You MUST use and complete the following statement within your answer, "Grant funds will be used to _______".

This is a proposal made to the Foundation for Enhancing Communities, Upstream Project, for support of Lebanon Valley Volunteers In Medicine's Walk-in Clinic. Grant Funds will be used for the LVVIM Walk-in Clinic. The Walk-in Clinic, established in 2016 as a result of a PA Department of Health Grant, provides absolutely free urgent care services to uninsured, and underserved residents of Lenabon County. Patients seen in the free Walk-in Clinic receive full access to a broad range of healthcare services including: no-cost primary medical care services, access to basic medical lab/x-ray services, referrals for specialty care, and prescription services.

Clinical services are primarily provided by volunteer physicians, nurse practitioners, physician assistants, nurses, social workers, and support staff. LVVIM has, for ten years, provided no-cost primary medical care and prevention services, free prescription medications, and no-cost diagnostic testing services to underserved, uninsured or low-income residents of Lebanon County.

Approximately 20% of U.S. adults seek health care at the emergency room (ER) each year, a percentage that has remained largely unchanged in the last decade (National Health Statistics Reports). WellSpan Health through the Good Samaritan Hospital sees more than 52,000 ER visits annually. Based on the population size of Lebanon County, Good Samaritan Hospital is seeing many times the number of ER visits than reported as the national average. Unfortunately, communities designated as medically underserved have significantly higher rates of persons seeking health care at the

emergency room <u>because they do not have any other place to receive care.</u> Access to comprehensive, health care services is important for promoting and maintaining health, preventing and managing chronic disease, reducing unnecessary disability, and premature death.

LVVIM provided **1,340 walk-in** visits over the past 12 months. On each of these visits, the patients are asked if <u>they would have gone to the ER for care if LVVIM were not available</u>. A full 44 percent (N=589) responded that they would have gone to the ER for care that could very approximately be treated within a primary care office. In effect, LVVIM's presence and accessibility in Lebanon County are contributing to the reduction of unnecessary use of the Emergency Department for low acuity health care needs.

LVVIM remained open to serve patients during the Covid19 Pandemic. We elected to continue to see patients on a face-to-face basis and by telehealth so that the low-income residents of Lebanon County had healthcare resources other than using the emergency room for their care needs. During this time LVVIM was able to treat non-covid patients but also was able to direct patients to the appropriate use of the testing sites as needed. We directed 30 or so of our patients (who tested positive) to community testing sites rather than using the ER.

LVVIM has become the medical home to more than 2,730 patients over the past 12 months. These patients have developed strong patient-primary care provider relationships, which results in timely treatment, testing, follow-up services, and a reduction of ER visits for low acuity care needs. Through the LVVIM Dispensary medications and daily testing equipment/supplies are provided to patients that cannot afford these items and otherwise would have not have filled the prescription.

LVVIM is a place where medically underserved and those who wish to serve them can come together to give and receive care and support which results in a healthier, happier and more productive community. The mission of LVVIM is "to provide free compassionate, quality health care and education for underserved members of our community".

The goals of LVVIM are simple:

- To improve the health and well-being of Lebanon County residents in need
- To keep persons of low to moderate-income healthy and productive
- To provide a free and accessible community-based source of regular and routine health care
- To strengthen the patient/provider relationships
- To minimize the use of expensive emergency room visits as a source of low acuity health care needs

To achieve these goals LVVIM operates an "absolutely free" health care clinic that offers scheduled appointments to our established patients and a no appointment necessary walk-in clinic for those with more urgent care needs. LVVIM is the only free clinic in Pennsylvania that offers FREE, no appointment necessary urgent care services.

Key Services LVVIM patients have access to the following service:

- Primary Care Services
- Physical Examinations
- Chronic Disease Management
- Prescription Medication
- Health Education and Support
- Diagnostic lab and X-ray services
- Specialty Care Referrals
- Social Work Services
- Interpreter services and bilingual staff are available, but patients are encouraged to bring their own interpreters

LVVIM has established guidelines that require that a patient or prospective patient either live or work in Lebanon County, have no health insurance or be underinsured and meet the income guidelines of 200 percent of the federal poverty level. Clients complete a self-certification that they meet these basic guidelines. Patients wishing to become an established patient, which gives them access to more convenient scheduled appointments, must provide household income documentation. For a single person this equates to annual earnings of \$24,980 and \$51,500 for a family of 4. LVVIM never bills patients for the care or services they receive; we do not receive third party reimbursement, and; are not affiliated with any governmental agency.

DATES & LOCATIONS

3. When and where will the project take place? List dates and locations as appropriate in chronological order. State if provided dates/locations are confirmed, estimated, or to be determined.

The LVVIM Walk-in Clinic is located at 711 S. 8th Street, Lebanon, PA 17046 and operates on Monday, Tuesday, and Wednesday between the hours of 9:00 am and 3:00 pm. No appointments are necessary to be seen by a healthcare provider and the services are FREE of charge to residents of Lebanon County who are uninsured and have a household income at or below 200% of the federal poverty guidelines. Patients are seen in the order of their sign-in with a priority given to those with more urgent needs. The Walk-in Clinic is closed on major US holidays and follows the local school closings during major weather events. During the Covid19 Pandemic LVVIM implemented a telehealth program to address the safety needs of our patients. Telehealth services are available to returning walk-in patients as may be needed of these services.

ROLES & RESPONSIBILITIES

4. Does the project involve partnerships, collaborations, service, or affiliations with other organizations that will strengthen the project? If so, LIST their name(s) and corresponding role(s) within the categories below OR if this does not apply to you, state why your project is best positioned for success as a single organization.

SINGLE ORGANIZATION STATEMENT: LVVIM has operated as a single organization since 2009. We believe that as a single organization we are in the best position to meet the basic health needs of the uninsured, underserved and low income population of Lebanon County. LVVIM has a long tradition of service to Lebanon County without duplication of services that already exist in the community.

PARTNERSHIPS: We are equally invested in providing this project and success is dependent upon all organizations and shared roles although one entity serves as the applicant for this grant. <u>Our application includes a letter from each partner that states their role in this relationship.</u>

Click or tap here to enter text.

COLLABORATIONS: We are working with other organizations to make this project happen, but we serve as the lead organization for this grant opportunity and our project success is enriched by, but not dependent upon, our collaborators. An additional letter is NOT required, but may help the application.

Click or tap here to enter text.

SERVICE: Our project will serve these organizations and cannot take place without their commitment to accept service. <u>Our application includes a letter from each organization (this includes schools) that states their intent to participate.</u>

Click or tap here to enter text.

AFFILIATIONS: Our project may be affiliated with these organizations in some way, but is not 100% dependent upon their participation. <u>An additional letter is NOT needed.</u>

Click or tap here to enter text.

COMPARABLES

5. Are other organizations in your service area providing services that are similar to your proposed project? If yes, state their names or services and explain how your project differs. If no, state NA.

LVVIM is the only FREE clinic in Lebanon County that is offering NO APPOINTMENT Urgent Care services to the uninsured, low-income, and underserved residents of Lebanon County, PA. A similar service is provided by The Lebanon Free Clinic which operates one day a week on an appointment basis. Days and times of operation being variable based on the availability of volunteer health care providers. The Free Clinic is a program of the Lebanon Rescue Mission and primarily serves persons known to the Lebanon Rescue Mission. Lebanon Family Health Services provides some service free of charge while others involve a minimal fee for services provided. Routine and ongoing healthcares services are not available through the Lebanon Family Health Services.

ASSESSMENT & IMPACT

6a. What will project success look like? Provide a brief overview of the project's key outcomes, outputs, and/or other results of success.

We view our success by the number of people who have improved health and well-being because of the services they receive through the Walk-in Clinic. LVVIM is only able to achieve its goals as long it is able to provide free and accessible community-based source of regular and routine health care to low-income, underserved persons in Lebanon County. Additionally, we view our success by the number of patients that return to LVVIM for regular and preventative care services. It is our hope that through a strengthened patient/physician relationship we are able to minimize the use of expensive emergency room visits as a source of low acuity health care needs. LVVIM has been a consistent and reliable source of healthcare to the underserved, uninsured and low income residents of Lebanon County since 2009. During the Covid19 Pandemic LVVIM remained open for face-to-face visits for non-covid19 related care. Accessibility of care for low-income residents of Lebanon County remains our top priority. While the uninsured and underserved population of Lebanon County are the direct beneficiaries of our service, the County's overall public health and economy benefit as well.

6b. How will project success be measured and documented (i.e.: how will you know the project is successful? Are you collecting value statements, numbers served, surveys, photos, before and after images, or using other methods)?

LVVIM implemented an enhanced patient health tracking/monitoring system that will enable data to be collected and reviewed on patients encounters, follow-up, compliance, conversion rate from a walk-in patient to an established patient, if the patient would have used the ER if LVVIM were not available and more. This data is regurally review and shared in report format with the Executive Director, Medical Director and Board of Directors. Changes in the service delivery system are made based on data collected and patient feedback.

FUNDING & SUPPORT

7. If this proposal is not funded at the level requested, will you be able to implement the project as stated? Explain as needed.

LVVIM is committed to providing no-cost healthcare services to the uninsured, underserved and low income residents of Lebanon County since 2009. If this project is not funded at the level requested, LVVIM will continue to provide services, however, may have to set priorties within the service delivery system, including establishing waiting lists or limiting the number of visits a patient can receive.

8. This grant opportunity will not fund 100% of any project. Restate the amount you are seeking and describe other funding sources and amounts.

LVVIM is seeking \$10,000 from TFEC in support of the Free Walk-in Clinic. LVVIM never bills it's patients for the care or services they receive; we do not receive third party reimbursement; and are not affiliated with any governmental agency. We rely entirely on the charitable giving of individuals, business and foundations and our own fundraising activities. LVVIM, like so many non-profit organizations, has experienced increased difficulty in having fund rasising events critical to our operation due to COVID19. To date LVVIM has received \$160,000 in committed funding of the \$170,000 necessary to operate the LVVIM Walk-in Clinic. The source of funds includes: High Mark Foundation (\$15,000), Community Development Block Grant (\$49,000), United Way (\$22,000), The Francis Dixon Foundation (\$24,000), The Women's Club of Lebanon (\$5,000), VNA Foundation of Lebanon (\$5,000), Hershey Palmyra Sertoma Club (\$2,500), Salem Evangecial Luthern Church (\$4,500), Blue Scope Foundation (\$4,500), Weaber Lumber (\$5,000). Individual donor (designated) gifts (\$13,000).

9. Did the applicant organization end its most recent fiscal year with a budget surplus or deficit? If so, briefly state the amount of the surplus or deficit and state how the surplus may be used (i.e. is it earmarked for another program) and/or how the deficit may be handled.

LVVIM ended the last fiscal year with a deficit of \$15,000. This deficit was caused the need to upgrade our computer systems for secutity purposes. To make up the deficit we borrowed an equal amount from our endowment.

ACCESS & INCLUSION

10. As a community foundation, TFEC fosters a climate of purposeful inclusion that values diversity of gender, age, race, ethnicity, national origin, range of abilities, sexual orientation, and socio-economic status. Please state how your project will be made accessible to all individuals who qualify for participation in the project and describe any accommodations, modifications, technologies, or services you will offer to ensure that all eligible participants experience the best possible services or outcomes.

LVVIM is a welcoming and inclusive organization that provides primary care services to those in need without regard to age, gender, gender identification, race, ethnicity, national origin, sexual orgin or socio-economic status.

BUDGET WORKSHEET

Complete the Budget Worksheet below; a Project Total is required.

| ITEM OR SERVICE Examples include: Contracted Services, Equipment, Personnel, Supplies; list your own as appropriate. | DESCRIPTION OF ITEM OR SERVICE | REQUESTED GRANT FUNDS Indicate where funds sought through this grant opportunity will be applied. | OTHER FUNDING SOURCES State the names and amounts of all other funding sources. | PENDING, COMMITTED, OR RECEIVED Using a P, C, or R, indicate the status of all funding sources. | \$ TOTALS Add across to provide a total for each row. Total columns as indicated in bottom row. |
|--|--|---|---|---|---|
| Facility | Rent | \$2,000. | 22,000 | | \$24,000 |
| Utilities | Electric/Telephone | \$0. | 20,000 | | \$20,000 |
| Computer/IT | IT support/Software/Computer Support | \$1,000. | 17,000 | | \$18,000 |
| Medication | Patient Supplies/Medications | \$2,000. | 16,000 | | \$18,000 |
| Equipment/supplies | Clinical Exam Supplies | \$0.00 | 20,000 | | \$20,000 |
| Wages | Nurse Practitioner/Medical Assistant | \$5,000 | 65,000 | | \$70,000 |
| | | \$ | | | \$ |
| | | \$ | | | \$ |
| | | \$ | | | \$ |
| TOTALS | | \$10,000 Total: Requested Grant Funds | \$160,000 Total: Other Funding Sources | | \$170,000 PROJECT TOTAL |

Lebanon Valley Volunteers in Medicine 2020-2021 Board of Directors List

Dr. Paul DiGiacomo, MD

3074 W. Oak Street Lebanon, PA 17042 717-270-5649

Pdigacomo@aol.com

Dr. DiGiacomo serves a *President*. He is a retired cardiologist and a member of the Board of WellSpan Health Good Samaritan Hospital in Lebanon, PA.

Mr. Richard Scott

10 Walden Road Lebanon, PA 17042 rscott@vimleb.org

717-272-2252

Mr. Scott serves as *Vice President*. He is the Executive Director of LVVIM. Mr. Scott is active in the community and serves on Treasurer of the Lebanon County United Way.

Mr. Frank Dixon

P.O. Box 333 Lebanon, PA 17042 717-272-4581

FJDixion@brandywinerecyclers.com

Mr. Dixon serves as *Secretary/Treasurer*. Mr. Dixon is a local Philanthropist (The Francis J. Dixon Foundation) and was a moving force in the development of Lebanon Valley Volunteers in Medicine.

Dr. Pat Welsh, MD

1400 S. Forge Road Palmyra, PA 17078. 717-273-8835

pwelsh@wellspan.org

Dr. Welsh serves as a *Director*. He a Board Certified Family Medicine Practitioner and maintains an active practice in Palmyra/Annville, PA.

Mrs. Virginia Follet

27 Barberry Lane Lebanon, PA 17042 717-270-7687

vfollet@wellspan.org

Mrs. Follett serves as a *Director*. Mrs. Follett is the Vice President of Outpatient Operation at WellSpan Good Samaritan Hospital, Lebanon, PA

water committee to



PO Box 333, Lebanon, PA 17042-0333 Tel: (717) 389-0995

July 14, 2020

To Whom It May concern;

Lebanon Valley volunteers in Medicine is committed to helping the estimated 12,000 uninsured and medically underserved residents in our community. Their FREE medical service is provided by professional medical personnel who volunteer their time to the Clinic.

VIM provides a community solution to healthcare access, preventative care and chronic disease management, with their walk-in service and scheduled appointments. VIM's timely FREE medical services, testing and follow up services have shown a reduction in Emergency room visits at the WellSpan Hospital.

By partnering with other health care providers, Lebanon Valley Volunteers in Medicine assures that the vulnerable population health needs are met by providing free compassionate, quality healthcare and education.

Sincerely,

Francis 1. Dixon

Chairman



July 9, 2020

To Whom It May Concern,

Please consider this a letter of endorsement for Lebanon Valley Volunteers in Medicine (VIM) as they seek grant support to further their mission in the Lebanon Valley. VIM has been a valued medical provider in our community for the past 11 years. Their much needed service was established in response to a critical need for primary health care for vulnerable uninsured and underinsured individuals aged 18-64. All services at VIM are provided without cost to patients.

VIM offers a myriad of free services such as primary health care, chronic disease management, community wellness programs, and physical exams as urgent care service, walk-in service and through scheduled appointments. They are invested in assisting individuals securing insurance coverage and medical homes and are expert at providing support to navigate the health care systems.

As the administrator of a nonprofit health care organization I can speak directly to the benefits of the services of VIM. Since their establishment in Lebanon County, VIM has collaborated and partnered with many health care providers to assure that needs of the vulnerable population are being met. They are well aware of community resources and have established an incredible network of mutual referrals.

The provisions of service at VIM are provided by a core of volunteer medical clinicians. The common web that weaves through the providers is an investment and a passion for assuring that health care needs are being met for individuals in our Lebanon Valley.

Our Lebanon Valley is fortunate to have VIM in our community to help meet the needs of an estimated 10,000 residents who are without health insurance at any given time. They are a much needed service and they are incredibly successful in helping out relatives, friends and neighbors obtain quality health care services.

Sincerely,

Kimberly Kreider Umble

President and CEO

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Building Community Through Better Health.

615 Cumberland Street, Lebanon, PA 17042 (717) 273-6741 Fax: (717) 273-6337

info@lebanonfamilyhealth.org www.lebanonfamilyhealth.org

2020 GREATER HARRISBURG COMMUNITY FOUNDATION UPSTREAM SIGN & SUBMIT FORM

Provide signatures from the applicant organization, below. Both organization representatives must sign.

By providing your original OR digital signature below, you agree that the provided information in this application is true to the best of your knowledge and may be submitted for review. Completion of this form is one component of your Complete Application.

| \boxtimes | President/CEO | | Richard Scott |
|-------------|--|--|---|
| | | Ink Signature | Digital Signature |
| ⊠ Bo | Board President | | Paul DiGiacomo, MD |
| | | Ink Signature | Digital Signature |
| All g | rant materials must be | submitted through the TFEC onlin | ITTED BY 4PM ON THE DEADLINE DATE e application system by 4pm on the deadline date |
| I NIS | grant opportunity does | not utilize delivered or mailed ma | tieriais. |
| | • • • • | Applicant Profile, Project Profile Submit Form with original or dig | e, Project Snapshot, Project Narrative, Budget |
| ⊠ B | _ | | rk positions and/or titles as applicable) must be |
| n o m | umber of letters that rganization's Board of | will best support their application. Directors will not be accepted. | or digital signatures. Applicants may submit the on. Letters of support from the applicant Identical form letters are discouraged. A is grant opportunity regardless of response to |
| m | ust upload letters wi | th original or digital signatures c | to other Agencies as stated in Question 4, you documenting the relationship. A letter of port if support is expressly stated. |
| Fi | | | de a letter signed by the Executive Leader of the rve as the Fiscal Sponsor. An original or digital |
| | RS 501(c)(3) determin | | |
| ⊠ 19 | st Page of Applicant C | Organization's Most Recent 990 | . If 990 is not available, upload applicant |

QUESTIONS

If you should have any questions regarding this form or TFEC grant opportunities, contact Jennifer Strechay, Program Officer for Community Investment, at jstrechay@tfec.org or 717-236-5040.

organization's most recent audit or financial statement to meet this requirement.