Knox County Senior Levy 2027 Application for Funding

NAME OF AGENCY/ORGANIZATION: _____

FEDERAL NON PROFIT ID # (ex: 501-C3#): (REQUIRED) _____

AGENCY/ORGANIZATION CONTACT PERSON: _____

CELL PHONE: _____

AGENCY/ORGANIZATION MAILING ADDRESS: _____

CITY: _____

STATE/ZIP: _____

AGENCY PHONE NUMBER: _____

AGENCY FAX NUMBER: _____

AGENCY E-MAIL ADDRESS: _____

AMOUNT OF SENIOR LEVY FUNDS REQUESTED: _____

☐ CHECK THIS STATEMENT IF YOU ARE APPLYING FOR SENIOR LEVY DOLLARS TO SUPPORT ONGOING ADMINISTRATION AND SERVICES EXPENSES.

☐ CHECK THIS STATEMENT IF YOU ARE APPLYING FOR SENIOR LEVY DOLLARS TO SUPPORT A ONE-TIME ONLY EQUIPMENT EXPENSE. PLEASE NOTE THAT FUNDING FOR ONGOING ADMINISTRATION AND SERVICES WILL BE GIVEN PRIORITY OVER ONE-TIME EXPENSES.

ENCLOSURES: Knox County Senior Levy 2027 Application for Funding – 8 Pages
Application Guidance (do not return with application) – 4 pages

KNOX COUNTY COMMISSIONERS PURPOSE STATEMENT

"It is the purpose of the Knox County Commissioners to distribute Senior Levy funds on a non-partisan, non-discriminatory basis for use by Knox County non-profit organizations/agencies for programs that directly serve this county's senior citizens".

The Knox County Commissioners will consider applications for funding senior services during the year April 1, 2027 through March 31, 2028. Non-profit, tax-exempt agencies seeking funds should demonstrate how their services can meet the needs of Knox County's senior citizens and serve to assist them to remain in independent settings. Programs and/or services that will be considered by the board include but are not limited to nutrition, social opportunities, transportation, chore, health care services, health and wellness activities and other supportive services **for all Knox County senior citizens who are 60 years of age or older.**

The application form is due at the Knox County Commissioners office no later than **4:00 PM on Friday, January 29, 2027.** Contact Penny Doyle with any questions, 740-393-6703 or pennydoyle@knoxcounty.oh.gov. *SUBMIT ONE ORIGINAL APPLICATION TO:*

The Knox County Commissioners Office
Attn: Knox County Senior Levy
117 East High Street, Suite #161
Mount Vernon, Ohio 43050

ADDITIONAL INFORMATION

1. **Note**: Only those applications received on or before January 29, 2027, will be considered for funding during program year 2027 (April 1, 2027 through March 31, 2028).
2. No application for funding will be considered for less than $10,000.00.
3. The Knox County Commissioners will receive recommendations for funding agencies from the non-partisan Senior Levy Advisory Board (SLAB) and will review and consider those recommendations when making final determination.
4. No question on this application is used for the purpose of limiting or excluding any organization/agency's consideration for senior levy funds or guaranteeing the appropriation thereof.
5. Please answer all questions on this application to the best of your knowledge. Some questions may not be applicable to your organization/agency, please indicate as NOT APPLICABLE – N/A. **Completion of the application does not ensure funding**.
6. Quarterly reporting is required. Organizations that do not comply with quarterly reporting will be considered for potential reductions in future applications.

STRUCTURE & SCOPE OF SERVICES

1. Provide a copy of documentation to support current tax-exempt status for new Knox County Levy applicants or for those whose information has changed during the last year.

2. Provide a current table of organization starting with a list of your Board of Directors and including the Officers of the organization/agency.

3. Provide a detailed breakdown of services provided to seniors (e.g. congregate meals, home-delivered meals, transportation for medical or socialization purposes, personal care, homemaker/home health aide services, chore services, home visits, clothing, health related services, outreach programs, information and referral advice and assistance, senior volunteer opportunities).

4. What are the top three (3) priorities of the organization related to senior service programming? How would this change in the event of a funding shortfall?

5. Submit only one copy of your organization's previous year's annual report and if there is not an annual report then submit a summary of your agency's previous year's services, which includes the number of individuals 60 years +, that were served and indicate the services received by those individuals. This material should demonstrate promotion of seniors remaining in independent settings. (It is not necessary to submit multiple copies of this material with your application.)

STATISTICS

1. What is the unduplicated and total number of Knox County seniors (60 years of age and older) your organization assisted in calendar year 2025 & 2026? Explain any differences with an increase or decrease in numbers between years.

2. Provide a description of your process for tracking and reporting the number of seniors your organization assisted in 2026. How do you verify your numbers served and that each individual served is 60 years of age or older AND a Knox County resident?

3. Provide the projected number of seniors by service that your organization intends to serve during the period April 1, 2027, through March 31, 2028, and how the levy money will be used to assist them.

COLLABORATION

1. How does your organization/agency cooperate and coordinate with other organization/agencies in the delivery of services to **Knox County Seniors**?

2. Identify your collaborative partners, the role of each partner and how they benefit your organization/agency.

3. How do you ensure that your organization/agency is accessible for seniors, focusing on issues such as: hours of operation, customer service and location, physical access (for disabled seniors)?

PROGRAM QUESTIONS REGARDING MANAGEMENT OF AGENCY RESOURCES

1. What is the organization/agency's plan for generating/increasing other revenue to meet its budgetary needs? Please list other funding sources to which you have applied. Describe any and all fundraising efforts for the previous year.

2. How do you recruit or encourage volunteers? How are the volunteers utilized? How many volunteers are involved in the delivery of services? How many of the volunteers utilized are also individuals served by your program?

3. Describe the manner in which your agency encourages or promotes donations from seniors.

4. Please explain in detail how you evaluate the effectiveness of each of the services you provide.

AGENCY BUDGET

1. Complete the attached 2027 Budget Request Form located on pages 6 and 7. In completing page 7, provide a list of all income sources and amounts, which encompass 2026 actual income and expenses and 2027 projected income and expenses.

2. What is the date of your organization's last review/audit from an independent accounting firm/individual? A copy of the review/audit should be provided with this application, and if not available, then a copy of your organization's Executive Board minutes that indicates when the most recent review/audit was accepted or approved by them.

3. Provide a copy of organization/agency's 2026 Financial Statements, which includes detailed information on how the senior levy money was used.

4. Identify and explain any unexpected changes of 10% or more (increase or decrease) in revenue and/or expenses from the previous year and its impact on delivery of services to seniors.

5. Describe the manner in which your agency encourages or promotes donations from seniors.

KNOX COUNTY SENIOR LEVY BUDGET FORM (2027)

Agency: _____

EXPENSES	2026 Gross Expenses	2026 Senior Levy Expenses	2027 Projected Expenses	2027 Senior Levy Requested Amount	2028 Senior Levy Projected Amount
1. Salaries – attach listing of all positions and costs					
2. Employee benefits – attach listing of all positions and costs					
3. Payroll taxes – attach listing of all positions and costs					
4. Professional fees					
5. Office Supplies					
6. Telephone/ Computer					
7. Postage/Shipping					
8. Occupancy (Rent or Mortgage/Utilities)					
9. Insurance					
10. Travel					
11. Conference & Meetings					
12. Additional costs associated with supplying services (provide itemized list of expenses for each service: e.g. chore).					
13. Employee welfare and volunteer recognition					
14. Printing, Public Relations & Publications					
15. Designated Reserves					
TOTAL:	0	0	0	0	0

KNOX COUNTY SENIOR LEVY BUDGET FORM (2027)

Agency: _____

INCOME	2026 Income	2027 Projected Income
1. Carry-over from prior year – identify all sources below.		
2. Support from Senior Levy		
3. Senior Donations		
4. Proceeds from special events – fundraising		
5. Legacies, Bequests or Endowments		
6. Government grants and/or Contracts		
7. Charitable Donations (United Way or other private sources)		
8. Contract Fees from Services Rendered		
9. Investment Income		
10. Other Income		
TOTAL	0	0

Include all assets which are used towards provision of services e.g. vehicles, buildings, computer/office equipment (attach separate list if needed).

ASSET SCHEDULE	Year Acquired	Depreciable Y/N	Projected Life	Program/Service
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Additional Information:

SIGNATURES

I hereby certify that information provided in this application is true and correct to the best of my knowledge.

Organization/Agency Board President or Chairman	*Date*
Chief Financial Officer or Treasurer	*Date*
Executive Director/President	*Date*

Senior Levy Application Guidance

(do not return pages 9-12 with application)

The Knox County Commissioners encourages the purchasing of supplies and services from Knox County companies and agricultural producers to serve the local interest. Supporting our farm community and providing fresh local products benefits our seniors, farmers and community and further aids in making Knox County a community taking care of itself.

COVER PAGE

Provide your organization/agency name, non-profit federal tax identification number, name of contact person, agency mailing address, agency phone number, agency fax number, agency's e-mail address and cell phone number. If your agency does not have a fax number or e-mail address indicate NOT APPLICABLE. Indicate on the line the amount of dollars your agency is requesting from the Knox County Senior Levy.

Identify by checkmark if you are requesting senior levy dollars for any one-time equipment purchases.

Identify by checkmark if you are requesting senior levy dollars for any ongoing administration and service expenses.

Submit your ORIGINAL application form to the Knox County Commissioners office no later than **4:00 PM on Friday, January 29, 2027.**

ADDITIONAL INFORMATION

The additional information page provides the applicant with basic information on the manner and timelines by which the Knox County Commissioners will review the various requests for funding. Any non-profit organization or agency which provide programs or services to all Knox County's senior citizens who are 60 years of age or older is welcome to apply for senior levy funds. The Knox County Commissioners is seeking to fund services that promote a senior's ability to remain independent in the community. These programs/services could include but are not limited to nutrition, social opportunities, transportation, chore, health care services, health and wellness activities and other supportive services.

STRUCTURE & SCOPE OF SERVICES

Completion of this section will provide information on the organization's structure, tax-exempt status, mission, services provided and the organization's near term future vision.

1. Enclose a single copy of organization/agency tax-exempt document.

2. Complete as requested.

3. Describe the services and programs your organization/agency provides to seniors.

4. Provide annual report if available or one sample packet of brochures, newsletters, invitations, etc. that are used by your organization/agency when conducting outreach activities to seniors. The Senior Levy Advisory Board (SLAB) will review the single packet of materials during its review process. **It is not necessary to provide more than one packet**.

STATISTICS

The Knox County Commissioners is interested in understanding how effective your programs have been. Unduplicated counts of seniors receiving a service as well as counts of service units actually provided allow us to gain an understanding of your reach within your service area. It is useful to provide measures that indicate by service the numbers of seniors who typically receive services daily, monthly, annually as well as having unduplicated counts of seniors. Getting a breakdown of service costs will help the Knox County Commissioners to understand your costs in providing services. Costs should be identified by service in such a manner as to clearly show the organization's total expenses, the amount and percentage paid by the levy and a unit cost for each service during 2026.

Additionally, the Knox County Commissioners are aware that there exists some duplication of services throughout the county. While there are legitimate reasons to encourage consumer choice, the county does not want to incur unnecessary added costs by having multiple, overlapping service providers.

1. Complete as requested.

2. Detailed means an accurate accounting of services rendered such as: If your organization/agency provided transportation, identify the number of one-way trips and the # of seniors who benefited from the transportation. If your organization/agency provided meals, provide counts of those who benefited from this service.

3. Describe your process for collecting, inputting and reporting the number of seniors your organization assisted.

4. How many Knox County seniors do you project to serve in 2026 and is your organization creating additional activities or programs to assist these seniors, if so, please explain in detail.

COLLABORATION

The Knox County Senior Levy was approved to ensure that needed services continue to be available to Knox County senior citizens. Many services that are provided to seniors also receive funding through other agencies and funding streams. In some ways, it is conceivable that the levy funding could be used to gain additional federal and state dollars and/or be used to provide needed services not otherwise available through Older Americans Act, Community Services Block grants or through Medicaid and Medicare. As a service provider, your organization is often competing with other Knox County entities to serve the same population. In this section, the focus is describing how your agency interacts with other entities to assure that services are rendered cost effectively and in a manner that supports consumer choice.

Provide a description of steps your agency takes to assure consumer access to your programs. Identify any obstacles to collaboration that impact your agency and servicing the needs of senior citizens.

Since funds are limited, it is important to assure if service provision results in gaining additional dollars into the county that would otherwise not be available. We are asking that you identify specific areas where Senior Levy funds are used as matching funds for gaining additional program and service dollars. An example would be receiving funds through the Nutrition Services Incentive Program (NSIP). Note the amount of additional funds you anticipate receiving during 2027.

PROGRAM QUESTIONS REGARDING MANAGEMENT OF AGENCY RESOURCES

Explain any significant changes in revenue and/or expenses that occurred during the last year. Describe the impact of these changes on your budget for 2027 and beyond. What changes have you made or are expecting to make to account for any shortfall from prior funding levels you received?

Many organizations make use of volunteers. Describe the manner in which your organization uses volunteers in the delivery or support of senior services. There is no age limits for volunteers.

AGENCY BUDGET

1. Budget Request Form is located on pages 6 and 7. Page 6 is a description of the organization's expenses. The columns represent recent history as well as anticipated expenses for 2027 and 2028. The Senior Levy columns identify the amounts your agency received during program year 2026 as well as the amount you are seeking for 2027 and a projection of what you hope to receive in 2028. The 2028 figure is only an estimate. All employee lists are to be by position title and **not** include the name of the individual holding each position.

   Note that our interest in 2028 is to understand future needs (for example, start-up costs for new programs or replacement or purchase of vehicles, food storage systems, or computer systems).

   Items 1-3 should include all salaries and wages paid to the organization/agency regular and temporary employees and contractors/consultants. Also include Employee Benefits such as retirement, health insurance, life insurance, etc. and all required payroll taxes.

   Items 4-11 Administration and overhead: costs should include supplies, telephone, postage and shipping, occupancy, equipment rental maintenance, printing and publications.

   Item 12 Specific Program costs: Include related costs for each service that are integral to the delivery of the service. Examples include required trainings for certification activities needed by food preparers or delivery staff, fuel costs for agency-owned vehicles which are used to deliver services. Include all costs of conducting and attending meetings.

   Membership Dues: Dues/fees paid to other organizations or cost of dues for individual membership of staff members in organizations relevant to agency function.

   Page 7 contains two charts. The first chart is a listing of all funds received as income or carried over from a previous year. For item 1, identify the total amount of carry-over funds. Then use the Additional Information box at the bottom of page 8 to specifically identify each source and amount that comprises your carryover funds. Item 2 "Support from Senior Levy" for 2027 Projected Income should agree with the amount entered on Page 6 Total box for 2027 Senior Levy Requested Amount column. Completion of the 2027 Income Projections column will provide the Knox County Commissioners with an understanding of the impact of levy dollars in the agency's operation. Identify the dollar amount that your organization/agency is holding in reserve for future capital improvements such as repairs and replacement for major capital fixed assets etc. Also include the amount of Senior Levy dollars that have been carried over from previous years.

   The second chart identifies all assets that are used by the agency/organization in the provision of services to Knox County seniors. This will serve to identify any major items that support your services program and which would likely need to be replaced at some time in the future. Attach a separate page if more space is needed.

SIGNATURES

Complete as requested.