The Kalamazoo Foundation for Excellence

2021 Budget Presentation
October 5, 2020
2021 Budget Timeline

Aug 31 – Finance & Executive Committee meetings

Sep 14 – FFE Board draft budget presentation

Oct 5 – City Commission draft budget presentation

Oct 12 – FFE Board budget recommendation to City Commission

Jan 2021 – City Commission budget adoption including FFE
# FFE Board of Directors

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
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</thead>
<tbody>
<tr>
<td>President</td>
<td>Dr. Angela Graham-Williams,</td>
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<tr>
<td>Vice President</td>
<td>James K. Ritsema</td>
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<tr>
<td>Treasurer</td>
<td>Adam McFarlin,</td>
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<tr>
<td>Secretary</td>
<td>Barbara Hamilton-Miller</td>
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<tr>
<td>Secretary</td>
<td>David Anderson</td>
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<tr>
<td>Treasurer</td>
<td>Sandra Calderon-Huezo</td>
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<tr>
<td>Treasurer</td>
<td>Alisa Carrel</td>
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<tr>
<td>Treasurer</td>
<td>Nathan Dannison</td>
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<tr>
<td>President</td>
<td>Jeanne Hess</td>
</tr>
<tr>
<td>President</td>
<td>Stephanie Hoffman</td>
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<tr>
<td>President</td>
<td>Rachel Lonberg</td>
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<tr>
<td>President</td>
<td>Alice Taylor</td>
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<tr>
<td>President</td>
<td>Charlene Taylor</td>
</tr>
<tr>
<td>President</td>
<td>Jack C. Urban</td>
</tr>
<tr>
<td>President</td>
<td>Von Washington, Jr.</td>
</tr>
<tr>
<td>President</td>
<td>Bobby J. Hopewell,</td>
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<tr>
<td>President</td>
<td>Founding Director Emeritus</td>
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Governance: The Board

+ 15-Member Board established in 2018; Emeritus added in 2020
+ Two successful transitions and rounds of elections
+ Current Board comprises 56% women, 43% persons of color
+ All recommended policies were approved at 2019 Annual Meeting
+ Operates fully to Open Meetings Act standards since day one
+ The Board remains intentional about their work together
Governance: Budgeting

+ Entering fourth successful budget cycle as established in bylaws
+ Continual concurrence between Board and City Commission
+ Approaching third year of independent audit filings
+ Proactive public reporting of financials by web and media
+ Transparency includes annual report, newsletter, and online tools
+ www.kalamazooicity.org/FFE
Governance: The Endowment

+ FFE Investment Subcommittee (FFEIS) was created: April 2019
+ Endowment investment infrastructure is in place: January 2020
+ First major gift has been received and invested: March 2020
+ First meeting of FFEIS was convened positively: June 2020
+ First report to FFE Board was received and approved: Sept. 2020
To support the goals of the City of Kalamazoo, fund aspirational investments in the city, and empower Kalamazoo residents to achieve the lives they want for themselves and their families.
Articles of Incorporation

+ Address generational poverty
+ Promote youth development and (...) employment for youth, under-employed and unemployed individuals, and persons seeking re-entry to the Kalamazoo community
+ Address capital and human infrastructure improvements
+ Develop and implement neighborhood improvements
Imagine Kalamazoo 2025

+ Complete Neighborhoods
+ Connected City
+ Economic Vitality
+ Environmental Responsibility
+ Good Governance

+ Inviting Public Places
+ Safe Community
+ Shared Prosperity
+ Strength Through Diversity
+ Youth Development
IK 2025 Continuous Progress

145 Actions
8 Strategic Goals
8 Years

Year 1  October 2017 - 2018
Year 2  October 2018 - 2019
Year 3  October 2019 - 2020
Year 4  October 2020 - 2021
Year 5  October 2021 - 2022
Year 6  October 2022 - 2023
Year 7  October 2023 - 2024
Year 8  October 2024 - 2025

27% COMPLETE
17% ONGOING
31% IN PROGRESS
25% NOT STARTED

ACHIEVE KALAMAZOO’S VISION BY YEAR 2025!
COVID-19 Response Partnerships

- Disaster Relief Fund
- Small Business Loan Fund
- Kalamazoo Micro Enterprise Grants
- Digital Access for All
- Learning Hubs

Total: $2.64 million to-date
Disaster Relief Fund

A partnership with the United Way of the Battle Creek and Kalamazoo Region.

+ Overall 50 organizations helped by DRF in 2020
+ 18% of DRF dollars came from FFE grant
+ Top areas were food and housing assistance
+ Joint work with similar Urgent Relief Fund
Small Business Loan Fund

A partnership with the United Way of the Battle Creek and Kalamazoo Region.

+ $1.35 million has been loaned to-date in 2020
+ 82% of eligible businesses were funded
+ 55% approvals were women and/or minority-owned
+ Kept businesses alive with fastest aid dollars
Digital Access for All

A partnership of Kalamazoo Public Schools, the Kalamazoo Public Library, the Kalamazoo Promise, and Kalamazoo Community Foundation.

+ Free high-speed Wi-Fi Internet access for one year
+ Up to 1,000 KPS households
+ More equitable access to distance learning
Learning Hubs

Support of Kalamazoo Youth Development Network.

+ Those lacking a positive home learning environment
+ Chosen from within new KPS Equity Cohorts
+ 160 – 200, K – 12 students served across 4 – 5 locations
MyCITY Summer Youth Employment
+ 1,200 youth served since 2017
+ $1.5 million in wages paid to youth since 2017
Youth Mobility Fund

+ More than 160,000 trips taken since August 2019
+ 2020/2021 focus on expanded partnership & COVID-19
# Economic Development

## 2020 Business Development Fund

- $1M in Strategic Site Acquisition for Core Neighborhoods
- 18 Businesses received Technical Assistance
- Seven Gap Grants were made of up to $25,000
- 32 Small Businesses Grants were made of up to $2,500
- $128,000 was invested in core neighborhood storefronts/facades
- Contractor certifications and trainings will resume when possible
- Loans of up to $35,000 are available
Affordable Housing

Including LISC Partnership

+ Nearly all new affordable housing since 2018 involves City supports
+ 140 single-family homes have been built or rehabbed since 2018
+ 508 multi-family units have been built or preserved since 2018
+ Strategic Site Acquisitions
+ Pathways Home
+ Housing for All initiative
+ Tax Foreclosure Prevention & Clearing Clouded Titles
Zero Tax Foreclosures
+ A partnership of the City, County Treasurer, and LISC
+ Zero owner-occupied tax foreclosures since 2018
+ 106 homeowners kept in their homes, many seniors

Clearing Clouded Titles
+ A partnership of the City and County Treasurer
+ Ten families helped in pilot year, annual goal of ten
+ FFE’s $5,400 secured $500,000 of market value for owners
“I have lived at this address for 79 years. Facing foreclosure after living here for such a long time creates a lot of stress (...) I just can’t emphasize enough how very helpful these contributions are to low-income residents of Kalamazoo. This program is indeed a real “life-saver.”
Infrastructure Investment

+ More than two miles of new sidewalks poured since 2019
+ Priority “safe routes to school” and near community assets
+ 2021 continues ongoing investment, one mile planned
Water Service Replacement

+ Approximately 10% of replacements since 2017 have been supported by FFE
+ The overall program supported by rate-payers has replaced 1,850 since 2017
+ Public map and dashboard
City of Kalamazoo Lead Service Line Replacement Project

A summary dashboard of lead water line replacements to date.

Replacements per Year

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020 (to date)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6</td>
<td>146</td>
<td>464</td>
<td>505</td>
<td>321</td>
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www.kalamazoomcity.org/maps
Communications
IK Projects Page, FFE Website, Social, Map Tool, Newsletters
2021 Draft Budget Presentation
<table>
<thead>
<tr>
<th>Aspirational Budgets</th>
<th>2020</th>
<th>2021</th>
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<tbody>
<tr>
<td>Lead Service Replacement</td>
<td>500,000</td>
<td>500,000</td>
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<tr>
<td>Great Neighborhoods: Infrastructure &amp; Parks</td>
<td>3,075,000</td>
<td>1,787,000</td>
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<tr>
<td>Neighborhood Engagement and Activation</td>
<td>50,000</td>
<td>100,000</td>
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<tr>
<td>MyCITY Summer Youth Employment</td>
<td>825,000</td>
<td>825,000</td>
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<tr>
<td>All Things Possible</td>
<td>133,800</td>
<td>134,674</td>
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<tr>
<td>SuperRec</td>
<td>151,400</td>
<td>175,358</td>
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<tr>
<td>Digital Access for All</td>
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<td>100,000</td>
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<tr>
<td>Economic Development</td>
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<td>1,933,000</td>
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<tr>
<td>Affordable Housing</td>
<td>2,275,000</td>
<td>2,410,000</td>
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<tr>
<td>Home Energy Efficiency Audit Pilots</td>
<td>66,000</td>
<td>92,000</td>
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<tr>
<td>Personnel and Program Costs</td>
<td>636,500</td>
<td>469,505</td>
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# The Foundation for Excellence

<table>
<thead>
<tr>
<th>Program Budgets</th>
<th>2017-2020</th>
<th>2021</th>
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<tbody>
<tr>
<td>Budget Stabilization</td>
<td>11,920,000</td>
<td>4,243,600</td>
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<tr>
<td>Tax Reduction</td>
<td>47,092,033</td>
<td>13,016,024</td>
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<tr>
<td>Aspirational Programming</td>
<td>36,235,013</td>
<td>8,526,737</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>95,247,046</strong></td>
<td><strong>25,786,361</strong></td>
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FFE INVESTMENT AREAS 2017 - 2021

- Aspirational Projects: 37%
- Budget Stabilization: 13%
- Tax Reduction: 50%
ASPIRATIONAL PROJECTS 2017 - 2021

- Youth Development: $6,044,232
- Complete Neighborhoods, Connected City, Inviting Public Places: $14,817,000
- Safe Community: $2,500,000
- Environmental Responsibility: $158,000
- Economic Vitality, Affordable Housing: $16,868,200
- Shared Prosperity: $2,106,500
- Good Governance, Program Costs: $2,267,818
Dedicated Staff

Laura Lam, Deputy City Manager
Steve Brown, Foundation for Excellence Manager
Katie Reilly, Neighborhood Activator
Kevin Ford, Shared Prosperity Coordinator
Chad Wendt, Youth Development Coordinator
Kerry Lyn Williams, Grant Specialist
Thank You