



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

September 22, 2022

Mr. Jeff Prior, Neighborhood Services Manager
Department of Development Customer Services
Village Hall
123 Madison Street
Oak Park, Illinois, 60302

RE: Request for Proposals (RFP) For Affordable Housing Project(s)

Dear Mr. Prior:

Thank you for the opportunity to respond to your Request for Proposal for Affordable Housing Projects. Attached you will find our application. This project will allow the Y to leverage other funding so we can increase our number of units and accept new residents through the increased number of accessible rooms available to rent.

The proposed initiative will specifically:

- **Renovate additional rooms to provide for additional housing.** The proposed project will leverage \$100,000 received from Loyola Medicine to renovate an estimated 30 additional rooms which will support the potential for a minimum of 30 additional residents. Funds will be used to refurbish single-occupancy rooms including the purchase and installation of new flooring, furniture, fans, refrigerators, painting, air conditioning units, beds, linens, and access to PPEs.
- **Renovate existing elevator to increase safety.** In addition, improvements will be made to the existing elevator that services the single-room occupancy rooms. This renovation will furnish and install a new elevator car top that will improve safety by increasing accessibility for repairs. The improvements will provide needed improvements to the elevator which provides critical service for residents that move in and move out and for residents with disabilities.
- **Rental assistance** - The proposed initiative also includes rent assistance so that the West Cook YMCA is able to maintain all residents, regardless of their ability to pay. The proposed grant will help provide rental support for residents that lose their jobs. These funds could assist 20 residents for blocks of 3 months of rental assistance at 100% or 5 Residents for 12 months at 100%

We appreciate your consideration and continued partnership in these efforts. Please find our attached response and required attachments. Please feel free to contact me at 708.383.5200, x3200 or phillip@westcookymca.org with any questions.

Sincerely,

Phillip Jiménez
President and CEO

APPLICATION FOR AFFORDABLE HOUSING TRUST FUND (AHTF)

Applicant Information

Applicant Name(s): West Cook YMCA

Address: 255 Marion Street

City/State/Zip Code: Oak Park, IL 60302

Federal Tax ID #: 36-2179780

Project Contact: Phillip Jimenez, President and CEO

Telephone: 708 383 5200 ext 3200

Email Address: phillip@westcookymca.org

Amount of Allocation Requested: \$ \$125,000

Type of Applicant (check one):

☐ Partnership ☐ Corporation ☒ Non-Profit ☐ Other

Please attach certificate of good standing.

Project Information

Project Name: West Cook YMCA Housing Renovation Initiative

Project Address (if applicable): 255 Marion Street

City/State/Zip Code: Oak Park, IL 60302

Project Priority

Select one of the categories your project applies to:

- ☐ Production of affordable housing including, without limitation, new construction, rehabilitation, and adaptive re-use;
- ☐ Acquisition and disposition, including, without limitation, vacant land, single family homes, multi-unit buildings, and other existing structures that may be used in whole or part to provide affordable housing;
- ☒ Grants or loans to not-for-profit organizations that are actively engaged in addressing the housing needs of eligible households;
- ☐ Financial assistance to eligible households to rent dwelling units;
- ☐ Financial assistance to eligible households to purchase dwelling units;
- ☐ Financial or in-kind assistance to preserve and/or maintain existing affordable housing;
- ☐ Weatherization of dwelling units occupied by eligible households;
- ☐ Emergency repairs to dwelling units occupied by eligible households

Project Description

Please provide a narrative of your project, demonstrating how it meets the Village's priority to provide sustainable financial resources to address the affordable housing needs of eligible households in Oak Park by preserving and producing affordable housing, providing housing-related financial support and services to eligible households and providing financial support for not-for-profit organizations that actively address the affordable housing needs of eligible households. An eligible household is defined as having income at or below eighty percent (80%) of the Area Median Income (AMI) for for-sale units and at or below sixty percent (60%) of the AMI for rental units

Specifically identify who will be served, how the services will address systemic challenges in the community, which housing needs are addressed, anticipated outcomes, etc. (As needed, continue on a separate sheet.)

The West Cook YMCA's Single-Room Occupancy (SRO) or Residence Program meets the Village's priority to provide sustainable financial resources to address the housing needs by preserving safe, affordable housing options in Oak Park. The Residence Program provides a critical resource to individuals that are either currently homeless or facing the possibility of losing their homes and is a strategic part to maintain affordable housing in the Oak Park community. The proposed project will serve up to 81 eligible households. The West Cook YMCA provides single-occupancy rooms for men 18 years and older to prevent homelessness. The Y's program is designed to complement other local homeless programming and to try and avoid redundancy in local capacity by providing single-room occupancy for individuals at or below the federal poverty level. We intend to refurbish rooms to meet the increased demand for low-income housing, however, this funding would allow us to refurbish 30 additional units in anticipation to the increase in demand when the eviction moratorium is sunset. In addition, this investment would be supplemented with two additional programs which includes access to food and access to evidenced-based community health programs to reduce chronic health risks such as diabetes, hypertension, and cancer.

This project will allow the Y to leverage other funding so we can increase our number of units and accept new residents through the increased number of accessible rooms available to rent. Residents at the West Cook YMCA have full member accessibility to the Y's facility, programs, and services. They will have access to affordable food costs rather than ordering delivery or going to the convenient store. They will also have access to our evidenced-based health intervention programs including Diabetes Prevention Program, Blood Pressure Self-Monitoring, LiveStrong, and our Weight Loss Program. The Y's residence programs reduce the social determinants of health by providing healthy and safe housing for adult men that meets their basic living needs including access to food, water, case management, and so much more.

The following housing issues will be addressed:

- **Renovate additional rooms to provide for additional housing.** The proposed project will leverage \$100,000 received from Loyola Medicine to renovate an estimated 30 additional rooms which will support the potential for a minimum of 30 additional residents. Funds will be used to refurbish single-occupancy rooms including the purchase and installation of new flooring, furniture, fans, refrigerators, painting, air conditioning units, beds, linens, and access to PPEs.
- **Renovate existing elevator to increase safety.** In addition, improvements will be made to the existing elevator that services the single-room occupancy rooms. This renovation will furnish and install a new elevator car top that will improve safety by increasing accessibility for repairs. The improvements will provide needed improvements to the elevator which provides critical service for residents that move in and move out and for residents with disabilities.
- **Rental assistance** - As the pandemic winds down, many residents are still experiencing financial burdens which impact their ability to pay. The proposed initiative also includes rent assistance so that the West Cook YMCA is able to maintain all residents, regardless of their ability to pay. The proposed grant will help provide rental support for residents that lose their jobs. These funds could assist 20 residents for blocks of 3 months of rental assistance at 100% or 5 Residents for 12 months at 100%

The services will address systemic challenges in the community by supporting additional affordable housing for 30 residents in Oak Park and improve existing services through the improvements to the elevator and rental assistance for the existing 51 residents.

The proposed outcomes include:

- Renovation an additional 30 residential units (30 potential residents) .
- Renovation improvements to the existing elevator (serving existing 51 residents).
- Rental assistance for approximately 10-20 residents (the funds will be used to support residents below sixty percent (60%) of the AMI.).

Funding: How will the AHTF allocation be used for this project? What additional funding sources are secured or will be secured upon receipt of allocation? The Village of Oak Park prefers that financing from other sources to be committed prior to the release of funds from the AHTF.

The AHTF allocation will be used:

- \$75,000- renovation of 30 housing units(30 potential residents) .
- \$25,000- renovate existing elevator (serving existing 51 residents).
- \$25,000- rental assistance estimated for approximately 10-20 residents (the funds will be used to support residents below sixty percent (60%) of the AMI.)

Leveraging: Briefly describe and/or summarize any leveraging of additional funds.

The West Cook YMCA has already received \$100,000 from Loyola Medicine to contribute towards the renovation of housing units. These funds will be leveraged for the project.

Project budget and/or Development Pro-forma: Please attach line-item budget and describe each line item including stating whether the funds have been committed or not.

	<u>Expense</u>	<u>Revenue</u>		
		<u>ATHF Funds</u>	<u>Other Sources</u>	<u>Total</u>
Renovation of housing units	\$175,000	\$75,000	\$100,000 (Loyola Medicine Committed)	\$175,000
Elevator Renovation	\$25,000	\$25,000		\$25,000
Housing Assistance- 10-20 residents (depending on duration of assistance)	\$25,000	\$25,000		\$25,000
Total	\$225,000	\$125,000 (approximately 55% of the total budget)	\$100,000	\$225,000

Need/benefit & Project Feasibility: Demonstrate that the proposed project/program and effectively meets identified current and future housing needs, using data-based analysis. Provide narrative and evidence that connects the proposed project with adopted Village priority(s)

According to the 2013 analysis that was conducted by the Illinois Housing Development Authority (IHDA), the Village of Oak Park had 3,991 units of affordable housing. At that time, 18.4% of all housing was affordable to homebuyers at 80% of regional median household income and to renters at 60% of the regional median household income.

The proposed project is aligned with the Village's priorities by:

- Providing the longest term of permanent affordability. The affordability of the housing will be maintained in perpetuity.
- Providing housing to serve the needs of households with the lowest incomes. As stated previously, the funds will be used to support residents below sixty percent (60%) of the AMI.
- Leveraging funds for projects. The proposed project will leverage \$100,000 from Loyola Medicine.

Timeline: Applicant must describe proposed timeline for expending funds, either in terms of steps required to deploy funds or schedules for capital project completion.

1. Month 1 -
 - a. Sign Otis Elevator Company proposal for renovation work
 - b. Order material for renovation project
 - c. Remove existing furniture and appliances, alarms, etc.
 - d. Prepare for/implement rental assistance
2. Month 2
 - a. Remove & dispose of old flooring in units
 - b. Remove glue adhesive
 - c. Repair wall and ceiling
 - d. Begin painting of all residential common areas and rooms
3. Month 3
 - a. Conduct electrical work
 - b. Conduct carpentry (doors, windows, mirrors, etc.)
 - c. Paint rooms
4. Month 4
 - a. Begin Repairs to elevator
 - b. Install floors
 - c. Install furniture
5. Month 5-12
 - a. Renovate elevator
 - b. Continue rental assistance
 - c. Identify residents for renovated units

Sustainability. Provide narrative below describing how the proposed project will contribute toward the provision of more sustainable and resilient neighborhood development:

The proposed project will provide additional affordable housing in Oak Park by providing an additional 30 units for affordable housing, improvements to existing housing units and rent assistance for approximately 10-20 residents depending on duration and % of assistance.

Equity: Provide narrative below describing how the proposed project will contribute toward the provision of more equitable neighborhood:

The West Cook YMCA is committed to establishing a more equitable neighborhood. For example, this year the board along with staff are going through the Y's Equitable Communities Agenda. The Equitable Community Agenda shares how Ys can become a more multi-cultural, anti-racist organizations in understanding community led solutions and partnerships, breaking the cycles of poverty of young people, increase access to healthy food, increase access to whole person health and mental health care, developing equity centers, and volunteer and staff leadership representative of community. Through this process we address stronger equitable policies, practices, and procedures in our operations, program innovation, collaborations, resource mobilization, and brand and visibility towards the advancement in organizational anti-racism and multiculturalism through transparent data and benchmarking and being accountable to the communities we serve. As we prepare to go through our strategic plan process in the

next 12-18 months, the board and staff are engaging the Y's Archive to understand the history of the Y movement and the West Cook YMCA along with going through the Equitable Communities Agenda to prepare for discussions around our strategic plan and how we develop our racial equity/racial justice goals. In addition, in October we are hosting a Board/Staff retreat to explore how we can set goals and benchmarks to measure our thoughtful and steady progress. The proposed initiative specifically furthers this commitment to equity by contributing to a more equitable neighborhood by increasing the amount of available affordable housing in Oak Park.

Site Information (if applicable)

If your proposed project includes acquisition, conversion, preservation and new construction of homeownership or rental housing, please provide the following information.

- i. Site Control. If proposed project is recommended for funding, proof of site control must be provided before funds are disbursed. Site control is or will be in the form of:

- ☒ Deed
☐ Option
☐ Lease (Term ____ Years)
☐ Purchase Contract
☐ Other (explain): _____
Expiration Date of Contract, Option, or Lease _____ (month/year)

- ii. Site Description/Land Use Status

Area of Site: _____ acres or _____ square feet

Is site zoned appropriately for your development?

- ☒ Yes
☐ No

If no, is site currently in the process of re-zoning?

- ☐ Yes
☐ No

What zoning category is required? N/A

When is zoning issue to be resolved? N/A(month/year) Has the

Village approved the site plan and/or plat?

- ☐ Yes
☒ No (not applicable)

If yes, provide a copy of the site plan/plat.

Are there any other development reviews and approvals required?

- ☐ Yes
☒ No

If Yes, please explain: List any required reports or studies underway or completed (such as soils report, environmental assessment, traffic study):

Has the Village issued the building permit?

- ☐ Yes
☒ No

Affordability:

Under the Village's AHTF, an eligible household is defined as having income at or below eighty percent (80%) of the Area Median Income (AMI) for for-sale units and at or below sixty percent (60%) of the AMI for rental units. Please indicate the number of total households and eligible households that will be assisted under this program and at what income levels.

50 below sixty percent (60%) of the AMI.

What is the proposed affordability period for the project:

The proposed affordability period for the project is for 1 year based on the contract start date.

How will the affordability period be enforced and monitored over time for compliance:

The West Cook YMCA monitors the occupancy of the single-room occupancy program on a monthly basis. This process will be used to enforce and monitor affordability for compliance.

If funds are granted directly to income-certified beneficiaries for the purposes of preventing homelessness or stabilizing housing situations, please describe the longer term means of ensuring that a housing situation is stabilized:

Not applicable, the funds will be used to support housing for impacted individuals.

Demonstrated Capability/Organizational Capacity/Partnerships

Describe the expertise of your organization and past projects to provide the type of housing or programs proposed for funding. Use attached page if necessary:

The West Cook YMCA's Single-Room Occupancy (SRO) or Residence Program has played a strategically important role in preserving safe, affordable housing options in Oak Park since 1953. The Residence Program provides a critical resource to individuals that are either currently homeless or facing the possibility of losing their homes and is a strategic part to maintain affordable housing in the Oak Park community.

Describe your staffing and attach resumes of key personnel (use additional pages as needed):

Phillip Jimenez, President and CEO

Luis Acosta, Director of Member Engagement

Luis Lazaro, Finance Director

Describe community partnerships and collaborations that will be achieved as direct result of this project and how they will strengthen community networking ties and expand and deepen access to the housing/services offered through the project.

The proposed project leverages funds from funds received from Loyola Medicine.

REQUIRED ATTACHMENTS TO APPLICATION

In addition to the submittal requirements described in the body of the Application, the following attachments may apply to your application:

X Project Budget or Development Pro Forma (required)

X Leverage Calculations (please see budget)

N/A Copy of site plan or plat if project is currently approved by the Village or in the process of being entitled (not applicable to non-construction projects)

N/A Work samples, illustrations of past projects, other documentation of community projects and partnerships (optional)

- Audited financial statement, tax returns and/or 990 for the past two years
- Most current interim financial statements
- Bios of key staff
- Board list, including affiliations, for nonprofit applicants
- IRS 501©3 Determination Letter for nonprofit applicants

Project Budget

Please attach line-item budget and describe each line item including stating whether the funds have been committed or not.

	<u>Expense</u>	<u>Revenue</u>		
		<u>ATHF Funds</u>	<u>Other Sources</u>	<u>Total</u>
Renovation of housing units	\$175,000	\$75,000	\$100,000 (Loyola Medicine Committed)	\$175,000
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Statement Of Activities
West Cook YMCA
08/01/2022 - 08/31/2022

Year to Date 2022	
Account Name	Actual
Revenue	
CONTRIBUTIONS	20,063.01
MAJOR GIFTS	9,000.00
SPECIAL EVENTS	60.00
PLANNED GIFTS	125.00
UNITED WAY	110.40
GRANTS	695,885.00
PLEDGES	0.00
MEMBERSHIP	649,995.03
RESIDENCE INCOME	177,895.71
HEALTH & FITNESS	6,147.00
AQUATICS	134,321.50
SWIM TEAM	76,579.56
SPORTS PROGRAMS	0.00
DAY CAMP	-3.00
SIGNATURE PROGRAM	119,352.00
POWER SCHOLAR ACADEMY	107,500.00
ADMINISTRATION	654,047.43
PARKING LOT INCOME (SOUTH COURT)	2,800.00
CDP PROGRAMS	-1,760.00
Total Unrestricted Revenue	2,652,118.64
Total Restricted Revenue	0.00
Total Revenue	2,652,118.64
Expenses	
SALARY	822,423.98
OVERTIME	22,774.49
INSURANCE	49,071.95
PENSION	58,328.57
FICA	62,068.24
CONTRACT SERVICES	319,055.54
LEGAL & AUDIT	47,564.44
SUPPLIES	57,743.57
OFFICE SUPPLIES	8,888.80
PURCHASES FOR RESALE	-240.00
TELEPHONE	27,487.73
POSTAGE	1,103.82
UTILITIES	117,356.62
EQUIPMENT REPAIR	26,896.13
GRANT EXPENSE	11,638.15
ADVERTISING	11,996.15
TRAVEL	43,219.03
CONFERENCES	247.62
EMPLOYEE TRAINING	27,231.61
FAIR SHARE	33,130.00
DUES	4,050.00
PAYROLL CHARGES	12,225.77
BANK SERVICE CHARGES	23,576.48
INTEREST EXPENSE	12,088.00
INSURANCE EXPENSE	33,648.33
PROGRAM EXPENSE	79,428.53
BAD DEBT EXPENSE	4,831.39
MISCELLANEOUS EXPENSE	2,702.22
DEPRECIATION	165,754.35
Total Unrestricted Expenses	2,086,291.51
Total Restricted Expenses	0.00
Total Expenses	2,086,291.51
Change in Net Assets	565,827.13

WEST COOK YMCA BOARD OF DIRECTORS

Board Officers

Officer	First Name	Last Name	Title	Term	County	Organization
Chair	Michael	Caroscio	Retired	2022	Cook	Oak Park and River Forest High School
Treasurer	John	Norton	Retired	2022	Cook	Oak Park Township
Secretary	Anita	Alvarez	Legal Counsel	2024	Cook	Maryville Academy
Immediate Past Chair	Paul	Koester	President	2021	Cook	The Koester Group, Inc.

Board Members

First Name	Last Name	Title	Term	County	Organization
Linda	Bernard	Retired	2022	Cook	West Suburban Medical Center
Tom	Ewert	Retired	2020	Cook	Apartment Building Owner
Glenn	Husa	Commercial Vice President	2021	Cook	Old Second Bank
James	Lencioni	President/Senior Architect	2021	Cook	Aria Group Architects, Inc.
Susan	Finn	Program Director/Pediatric Nurse Practitioner	2023	Cook	Loyola Medicine
Siva	Balu	Chief Information Officer	2024	Cook	UnitedHealth Group
Thomas	Irvin	Managing Partner	2024	Cook	Guggenheim Investments
Dr. Damien	McKnight	Physician	2024	Cook	Rush Oak Park Hospital



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248222119
June 28, 2012 LTR 4168C E0
36-2179780 000000 00

00024049
BODC: TE

THE WEST COOK YMCAS INC
255 S MARION ST
OAK PARK IL 60302-3103



004475

Employer Identification Number: 36-2179780
Person to Contact: Kaye Keyes
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your June 19, 2012, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in December, 1944.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

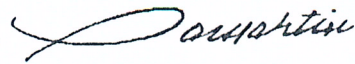
Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

0248222119
June 28, 2012 LTR 4168C E0
36-2179780 000000 00
00024050

THE WEST COOK YMCAS INC
255 S MARION ST
OAK PARK IL 60302-3103

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



S. A. Martin, Operations Manager
Accounts Management Operations

Budget Report - 2022 Operating

West Cook YMCA

01/01/2022 - 12/31/2022

Account Number	Account Name	Annual
Revenue		
0100	CONTRIBUTIONS	50,000
0200	MAJOR GIFTS	126,000
0300	SPECIAL EVENTS	95,000
0400	PLANNED GIFTS	50,600
1000	GRANTS	817,250
1100	MEMBERSHIP	1,012,007
1200	RESIDENCE INCOME	373,450
1300	HEALTH & FITNESS	19,854
1310	AQUATICS	204,226
1320	SWIM TEAM	165,708
1340	SIGNATURE PROGRAM	493,208
1348	POWER SCHOLAR ACADEMY	143,000
1350	ADMINISTRATION	7,200
1391	REALIZED GAIN (LOSS) ON INVESTMENTS	15,000
	TOTAL REVENUE	\$ 3,572,503
Expenses		
2100	SALARY & WAGES	1,572,229
2200	HEALTH INSURANCE	93,920
2205	PENSION	75,530
2300	FICA	118,637
2400	CONTRACT SERVICES	516,277
2405	LEGAL & AUDIT FEES	45,400
2500	SUPPLIES	100,880
2505	OFFICE SUPPLIES	3,000
2540	PURCHASES FOR RESALE	800
2600	TELEPHONE	37,200
2700	POSTAGE	12,860
2800	UTILITIES	134,784
2900	EQUIPMENT & REPAIR / SHUTDOWN EXPENSE	49,664
3000	GRANT EXPENSE	25,700
3100	ADVERTISING	75,103
3200	TRAVEL	56,500
3300	CONFERENCES	12,000
3400	EMPLOYEE TRAINING	25,500
3500	FAIR SHARE	56,544
3510	DUES	1,050
3700	PAYROLL EXPENSE	17,095
3710	BANK SERVICE CHARGES	33,524
3740	INTEREST EXPENSE	24,000
3760	INSURANCE EXPENSE	54,252
3800	PROGRAM EXPENSE	79,640
3900	MISCELLANEOUS EXPENSE	28,700
4000	DEPRECIATION	234,001
	Total Expenses	\$ 3,484,789
	Change in Net Assets	\$ 87,714

PHILLIP JIMÉNEZ

INNOVATIVE LEADER THAT TRANSFORMS MULTI-LEVEL, COMPLEX ORGANIZATIONS TO
ACHIEVE STRATEGIC GOALS IN PARTNERSHIP WITH COMMUNITY COLLABORATORS.

SUMMARY

- Innovative, self-starter with proven development experience in a large, complex human services organization in the Chicago metropolitan area.
- Leverages a diverse set of experiences with large, challenging organizations and develops innovative responses including the establishment of an international office in Mexico, overseeing fundraising and development for a \$45+ million state-wide human service agency, a national educational organization, national cultural museum and the West Cook YMCA.
- Skilled fundraiser that has raised \$20,000,000 in contributed revenue since 2010.
- Demonstrated ability to initiate, organize, and execute new programs and operations from concept through implementation at progressively complex organizations.
- Skilled in multiple areas of management in non-profit and charitable services organizations, including the analysis of potential funding opportunities, finance, regulatory compliance, human resources, budget allocation, marketing, community relations, forecasting, and board leadership.
- Proven track record of aligning staff skills with the needs of the institution through the hiring, training, and coordination of staff.
- Possesses strong facilitation, public speaking, presentation and mediation skills.

WORK EXPERIENCE

President and CEO 2014 - Present
West Cook YMCA, Oak Park, Illinois

- Built community support and funding model for a new integrated health facility with an estimated project value of \$65 million dollars to integrate chronic disease prevention, education, fitness programming, navigation, primary and specialty care in partnership with strong local health providers, such as: Proviso Township Mental Health, Loyola Medicine, Rush University Medical Center, School Districts 90 and 89, PCC Community Health, West Suburban Medical Center, and Cook County Hospital.
- Enhanced operational performance by employing sound fiscal management strategies to navigate the 2020 operating year resulting in a \$600,000 profit.
- Transformed the association over the past 7 years by conducting an initial assessment of membership and financial resource declines and then repositioning programs and resources to reach new market spaces and drive innovation. As a result, exceeded best-in-class contribution percentage of revenue of 15% over the past 5 years. In addition,

📍 310 Forest Ave, River Forest, Illinois 60130

☎ 312-925-5866

✉ philjimenez@hotmail.com

SKILLS

- Strategic Visionary
- Organizational Change Agent
- Community Collaborator
- Strong Fiscal Manager
- Solutions Focused
- Program Innovator
- Mission Champion
- Culturally Competent Leader
- Compassionate Leadership Style
- Media spokesperson

COMMUNITY LEADERSHIP

2016 - Present

Board Member
Illinois State Alliance

Serves on the Executive Committee, as Board Secretary, and participating in the CEO Search Committee.

2016 - Present

Governance Committee
Member
Y-USA

Developing Charter for YMCA Network of Association of Mid Sized Y's.

2020 - Present

Hispanic Latino YMCA
Leadership Network
Member

contributed revenue was 60% in 2020 which offset potential operational losses. • Led a strategic programmatic shift to Community Integrated Health which addressed the social determinants of health through new programming, reaching new communities, and building strategic partnerships to drive increased membership sales and operational revenue. This process included the realignment of staff resources, leveraging of philanthropic resources and development of strong community partnerships to facilitate implementation. • Translated the new Equitable Communities agenda into programming to inform engagement with members and the community, innovate new programs and services, and to move towards a more anti-racist, multicultural organization. • Selected to participate in YMCA of the USA cohort: Undoing Racism initiative, 1 of 70 YMCA staff persons nationally. • Secured \$520,000 in appropriations through relationships and advocacy to ensure long-term sustainability of the West Cook YMCA.	2018 - 2019 Strategic Planning: CEO Advisory Committee Y-USA 2012 - Present Board of Directors Oak Park / River Forest Community Foundation Serves on the: Executive Committee, as Audit Chair, Governance Committee, and CEO Search Committee. 2016 - Present
Vice President and Chief Operating Officer National Museum of Mexican Art, Chicago, Illinois • Served as the first Chief Operating Officer in the history of the Museum. • Oversaw overall operational responsibilities for the Museum. • Ensured fiscal, operations, revenue, marketing, human resource, technology, strategic and programmatic plans were effectively implemented across all segments of the organization. • Facilitated the long-term, strategic growth of the organization and its mission in partnership with the President and the Board. • Supervised and evaluated the work of the Development Department to ensure that the flow of funds permits progress towards the achievement of its mission, present needs and future potential. • Oversaw an annual operating budget of approximately \$5 million.	Committee Member River Forest School District #90 Serve as a member of the Strategic Planning Committee and Social Emotional Advisory Panel. 2015 - Present Board Member NBC / Telemundo - Community Action Board
President and CEO San Miguel Schools, Chicago, Illinois • Successfully facilitated the closure of a neighborhood campus through a collaborative process which engaged core stakeholders in a mutually beneficial solution. • Led board of directors and leadership staff through first ever strategic planning process setting a course for the school's future with clear and solid direction • Prior to selection as President and CEO, served as Vice President of Advancement. In this role: ◦ Facilitated a 27% increase in total contribution revenue in eighteen months. ◦ Increased net revenues for the schools' marquis event by 28% . ◦ Secured the second largest operating gift in the history of the school.	2009 - Present Emeritus Board Member Mujeres Latinas En Acción 2008 - Present Member Nuestro Futuro of the Chicago Community Trust 2014 - Present
Director of Advancement Lutheran Child & Family Services, River Forest, Illinois • Led the advancement initiatives to fill critical operational gaps for a statewide organization valued at \$45 million. • Served as a key member of the management team with input into all	Member Oak Park/River Forest Rotary Club

institutional planning processes.

- Increased funds and program revenue through more efficient utilization of services.
- Built critical infrastructure for a comprehensive advancement program producing over \$1.8 million, including special events, major gifts, individuals, congregational cultivation, corporations, and foundations.
- Oversaw a donor portfolio of \$3 million.
- Implemented department-wide cultural and procedural change, yielding an annual budget increase of 60% since 2002.

International Sales Director, Mexico City, Mexico 1994 - 2001

Ispat Inland, Inc., Chicago, Illinois

- Identified as representative to spearhead implementation in Mexico City, Mexico at the age of 27 after serving as a Sales Representative from 1994-1998.
- Conducted market forecasts and plans for a satellite office of Ispat Inland, Inc., the fifth largest steel manufacturer in the world which produces flat rolled steels for the automotive, appliance and magnetic markets, in Mexico City.
- Established all aspects of the new international office, including litigation, international trade, logistics, government negotiations and the identification of suppliers and facilities in Mexico City, Mexico.
- Secured new accounts by increasing the customer base resulting in increased revenues from \$10 million to \$37 million on an annual basis.
- Expanded underdeveloped markets such as the appliance and magnetic steel markets.

EDUCATION

Certificate of Professional Achievement in Nonprofit Management 2006

Northwestern University, Evanston, Illinois Kellogg School of Management, Center for Nonprofit Management

Certified Planned Gift Specialist LC-MS 2003

Bachelor of Arts Degree, Political Science 1990 - 1993

University of Wisconsin, Madison, Wisconsin

Emphasis: Management and Marketing

Luis Acosta

8231 W. 141st ST | Orland Park, IL 60462 | Cell: (773)620-8692 | Luis.Acosta.001@gmail.com

Skill Highlights

Organize Fundraiser, Major Donors Experience, Analytical Skills, Problem Solving, Technology-focused, Innovative Critical Thinking, Delegation Abilities, Non-Profit Management, Vendor Management, Strategy Development, Accounting, Grant Writing, Self-motivated and starter, and Bilingual

Education

BAS, Bachelor of Applied Science in Business Administration | March 2018 | Olivet Nazarene University, Bourbonnais, IL
AA, Ministry of Arts | June 2005 | The Salvation Army College, Rancho Palos Verdes, CA

Experience

June 2019 – Present

Managing Director | The Salvation Army Crossgenerations Community Center | Blue Island

- Collaborate with key staff to create annual development strategy and budget
- Direct and guide staff over activities to ensure the annual revenue budget is met
- Supervise twenty-two employees in human resources, finance, social services, gym, kitchen, and maintenance departments
- Ensure staff adheres to annual budget, policies, and long-term goals
- Spearheaded \$1.5 million-dollar yearly budget
- Hire, train, and guide team toward accountable, goal-oriented objective
- Effectuate yearly fundraisers and events to increase profit by 20%
- Prepares annual budget in coordination with headquarters, directors, and advisory council
- Generate strategy to increase community visibility by collaborating with local agencies
- Monitor employees through special projects increasing gym utilization by 15%
- Collaboration with auditors to ensure annual financial inspections

June 2018 – 2019

Managing Director | The Salvation Army Community Center | Kansas City, MO

June 2015 – 2018

Managing Director | The Salvation Army Community Center | Fort Wayne, IN

- Create and implement development policies and procedures that utilize best practices
- Coordinated community fundraiser to increase profit
- Oversaw departments responsible for grants, special events, donor outreach, and planned giving
- Improved profit margins by 40% while reducing expenses by 10%.
- Serve as an advocate in the community, with local leaders, religious organizations, other partnerships
- Championed special project employees to execute effective fundraising efforts
- Oversaw and guided thirteen employees and three occupant agencies
- Resolved human resource inquiries to improve staff morale

June 2013 – 2015

Administrative Assistant | The Salvation Army Adult Rehabilitation Center | Chicago, IL

- Direct financial and accounting functions; including general ledger, accounts payable/receivable, purchasing, payroll, and bank reconciliations.
- Executed interpersonal skills with eight thrift store managers and ten assistant managers
- Effectively strategized time and resources to increase production by 10%
- Oversee reporting of outstanding funding receivables
- Achieve month-end closing to keep accounting data organized and ensure accountabilities
- Arranged strategic planning to improve working environment

Contact

www.linkedin.com/in/luis-lazaro-carrasco-b8a82114 (LinkedIn)

Top Skills

Accounting

Financial Analysis

Financial Modeling

Languages

English (Native or Bilingual)

Spanish (Native or Bilingual)

Luis Lazaro-Carrasco

Finance Director

Oak Park, Illinois, United States

Summary

Senior Finance and Accounting professional with MBA with 20+ years of broad based experience in Fortune 500 firms, and in high growth, emerging entrepreneurial and turnaround environments. Leadership roles in systems conversion, consolidation of businesses, and startups. Multi-office development and design of finance and accounting systems and procedures. Excellent presentation, communication, and financial modeling skills..

Experience

YMCA

Finance Director

2016 - Present (6 years)

Greater Chicago Area

St. Augustine College

Adjunct Faculty / Business, CIS, & ADM Dept.

2013 - 2015 (2 years)

INDEPENDENT CONSULTING

INDEPENDENT CONSULTING

2013 - 2014 (1 year)

Aon Risk Services

International Finance Manager

March 2007 - 2013 (6 years)

International Finance Manager/Controller

Global finance leader for one of Aon's international business units.

Responsible for accounting, finance, and treasury departments as well as member of the business unit management team. Collaborated closely with corporate accounting and finance departments on consolidation process, budgeting, forecasting, audit, legal, regulatory and tax reporting. Delivered monthly financial reporting and commentary. Provided finance support to business development team and country managers with portfolio performance,

financial projections and investment analysis (ROI, sensitivity, and breakeven) for direct marketing campaigns to drive worldwide business strategy and product innovation strategies

Unilever

Finance Manager Accounting / Reporting / FP&A

June 2001 - March 2007 (5 years 10 months)

Lisle, IL

Finance Manager, Accounting / Reporting / FP&A (2004-2007)

Reporting to Corporate Controller, led month end close process including activities with Shared Services, Sales&OP and Supply Chain. Provided monthly financial flash, commentary, and financial performance reports to Executive Team and Global Finance Group in Rotterdam. Completed internal, ad hoc reports, liaise / respond / prepare reports in response to requests from Global Finance in Rotterdam. Coordinated and prepared strategic plan, annual plan and monthly rolling forecast with Global Finance, Marketing, Sales&OP, and Shared Services departments for NA Region. Worked closely with consultants and managers on projects such as: customer profitability analyses, implementation of Hyperion Essbase to improve reporting and decision-making. Collaborated on business process re-design (SOX). Assisted with internal and external annual audit.

Associate Finance Manager, Finance Department (2003-2004)

Delivered financial models; provided input for strategic planning, annual estimates, and forecasts; and aligned reporting systems to reflect progress toward delivery of business unit targets. Conducted OH analysis and monitored leading brands' P&L, participated in monthly close, and handled special projects to improve and streamline financial reporting and planning processes. Responded to ad hoc financial requests from senior management. Responsible for reconciling operator and distributor trade and marketing budget.

Senior Financial Analyst, Finance Department (2001-2003)

Developed SKU-level P&L tool for consistent profitability analysis. Provided decision support to Field Sales on how optimized allocation of trade spending through detailed customers' P&L profitability analysis. Acted as a finance lead with Marketing by performing financial pro-forma P&Ls for new innovations and conduct analysis to determine if new products should be launched. Involved in special projects supporting category and process efforts.

Webvan

Fresh Market Inventory Analyst

July 2000 - June 2001 (1 year)

Carol Stream, IL

Finance analyst for cutting edge web-based grocer. Tracked, analyzed, inventory movements in the Fresh Market and General Merchandise areas. Analyzed and reported slow moving and spoilage reserves and reconciled Balance Sheet accounts. Improved inventory activities, trade margin reports, and spoilage levels by partnering closely with area directors, buyers, and finance staff on findings and improvements. Brought financial systems in line with actual as part of trade margin enhancement and shrinkage task force project.

Corn Products International

Sr. Accountant

November 1995 - July 2000 (4 years 9 months)

Bedford Park, IL

Senior Accountant, Sales Revenue Team (1999-2000)

Reported financials for Puerto Rican sales company, Crystal Car Line Inc., and Chicago, Peoria & Western Railway; prepared and submitted U.S. consolidated income statement. Responsible for compliance for export group and established strategic reporting methods and reports for Corn Products in U.S., Mexico, and South America.

Senior Accountant, Inventory Team (1998-1999)

Analyzed and improved U.S. product inventory, including consignment and reconciled deferred freight of U.S. plants. Drove SAP Financial upgrade project and GrainSmart implementation. Streamlined states' product registration and tonnage report filing; resulted in more efficient financial reporting.

Accountant, Raw Material Team (1997-1998)

Prepared accounting reports for hedging instruments, including broker reconciliation, Chicago Board of Trade futures/options reports, and gain/loss allocation by plant; completed accounting and reconciliation for raw material products. Analyzed plant monthly yield report and variance analysis. Streamlined internal controls in inventory reporting and turnover and month-end processes. Improved decision support system (DSS) reporting methods, vendor payment history tracking, consignment inventory detail and valuation, and germ and grain reporting formats.

Junior Accountant, Balance Sheet Team (1995-1997)

Kraft Foods Group

Payroll Accountant / Corporate Accountant

January 1994 - October 1995 (1 year 10 months)

Deerfield

Education

Loyola University of Chicago - Graduate School of Business

MBA, Accounting and Finance · (1996 - 1997)

Colegio Universitario de Estudios Financieros

Bachelor of Business Administration (B.B.A.), Business Administration and Management, General · (1980 - 1985)