



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

March 28, 2018

Ms. Dawn Stockmo, Neighborhood Services Manager
Department of Development Customer Services
Village of Oak Park
123 Madison Street
Oak Park, Illinois, 60302

RE: Requests for Proposals- Affordable Housing Project(s)

Dear Ms. Stockmo:

The West Cook YMCA respectfully request an investment of \$750,000 in a conversion project of the first floor or 38 units of the YMCA's 128-unit Residence for Men.

The existing facility contains individual rooms without bathroom or kitchens facilities within the room. The proposed project would convert the entire floor into 21 efficiency apartments for income eligible single adults.

We thank you, again, for your investment in the West Cook YMCA's Residence for Men program. If you have any questions, please feel free to reach out to me at 708-383-5200, extension 3200 or phillip@westcookymca.org.

Sincerely,

Phillip Jiménez



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NARRATIVE

1. TRACK RECORD OF THE ORGANIZATION.

Since its beginnings in 1903, the West Cook YMCA has been an integral part of the communities it serves. What began as a men's organization quickly expanded to include women the following year and dormitories for men in need of temporary housing in 1910. The current home of the Y was dedicated in 1953. The Y is governed by a volunteer Board of Directors comprised of local community leaders and Y members who share in and support the organization and its mission.

The West Cook YMCA's Single-Room Occupancy (SRO) or Resident Housing Program is a strategically important part of the fight to provide safe, affordable housing for individuals at the low-income levels in Oak Park community. The West Cook YMCA has capacity for 77 units. The average income level of the West Cook YMCA residents is about \$14,500 a year. A week of rent is \$125/week, which is approximately 35% of the average resident's income. Currently, about 32% of the West Cook YMCA residents are employed and 68% receive some type of benefit such as public assistance shelter allowance or disability.

The existing facility contains individual rooms without bathroom or kitchens facilities within the room. The proposed project will be a pilot project to convert a portion of these units into efficiency apartments for income eligible single adults. The proposed development will serve a wide variety of men and women who are in need of affordable housing. An ability to live independently will be a key factor for acceptance into the building.

2. CHALLENGES FACED IN GEOGRAPHIC AREA.

In 2012, the Metropolitan Mayors Caucus (MMC), the West Cook County Housing Collaborative, the Chicago Metropolitan Agency for Planning (CMPA), and the Metropolitan Planning Council (MPC) collaborated on a housing plan exercise, including Oak Park¹. As part of this process, they charted demand and supply trends for housing within the community. In this study, they identified that the supply of rental housing units in the Oak Park area for individuals making less than \$15,000 a year did not meet the demand within this income bracket. In fact, 45% of residents at this income level (or roughly 700) were living in housing units above the level that they could afford.

In Oak Park, 3,991 units of affordable housing were also identified in a 2013 analysis by the Illinois Housing Development Authority (IHDA). In fact, 18.4% of all housing was

¹ "Homes for a Changing Region, Phase 3: Implementing Balanced Housing Plans at the Local Level," http://www.cmap.illinois.gov/documents/10180/10818/WEST_COOK_COLLAB_HOMES_FOR_A_CHANGING_REGION.pdf/64da5665-0cae-4ebd-9416-1217953a3cf8



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identified as affordable to homebuyers at 80% of regional median household income and to renters at 60% of the regional median household income.

For individuals living near the poverty level, a life event such as a divorce, illness, or job loss can quickly create a situation which leads to homelessness. In addition, some individuals are interested in pursuing a safe, affordable housing situation to further their life goals. Single-Room Occupancy (SRO) units have served a critical need of providing affordable housing for low-income and formerly homeless individuals for over a hundred years. SROs are individual units with shared bathroom facilities. Most individuals that seek out SRO housing have incomes at or below the poverty line.

While the demand for affordable housing units exceeds supply, there has been pressure to convert single-room occupancy units to more profitable uses. In fact, a tidal wave of real-estate development and increased housing costs have threatened to engulf much of the Single Room Occupancy (SRO) housing in Chicago and surrounding suburbs. In Chicago alone, during the past three years, more than 2,200 rooms in residential hotels have been converted by developers into higher-priced apartments. The city estimates that another 6,000 units are at risk. In fact, the West Cook YMCA has the only SRO program in the western suburbs. As a result, the Y is playing a critical role in serving the need for individuals that are looking for affordable housing within the Oak Park area.

3. POPULATION SERVED. The West Cook YMCA Residents Program has 68 residents, of which 100% are Oak Park residents and 100% are currently males. Approximately 70% are African American and 30% are Caucasian. The income percentages of the participants are 88% qualify as very low to moderate income, 43% qualify as very low income (< \$16,000), 25% are low income (<\$26,660), and 17% are moderate income (<\$42,600).

4. READINESS TO PROCEED

- **Resources secured/intended to secure:** The Single-Room Occupancy at the West Cook YMCA is a distinct program that requires unique funding to support the lower rents for its residents. The total cost to run the program every year is approximately \$369,461. In order to maintain lower rents, the West Cook YMCA has pursued and received approximately \$20,000 of outside support from the Village of Oak Park's Community Development Block Grant (CDBG) program. In addition, the Y has received funding from the Oak Park River Forest Community Foundation to initiate the case management program for the West Cook YMCA. This funding was critical in initiating case management capabilities, including the development of Individual Service Plans, referrals, and providing navigational support to residents to access critical resources. Finally, the West Cook YMCA was able to initiate some long overdue capital improvements to the facilities over the past year as a result of support from the Manaaki Foundation (bathroom renovation) and the Oak Park Mental Health Board (security cameras).



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For the proposed project, the Village of Oak Park funding will be seed money for the renovation. In addition, other sources will be pursued including private foundation and/or loans for the project.

Capital Sources	Amount
Village of Oak Park Impact Funding	\$750,000
Other Sources, including private foundation support and/or loans	\$750,000
Total	\$1,500,000

PROPOSED IMPLEMENTATION TIMELINE.

Development Activity	Season Completed
Site Acquisition	Completed
Zoning Change	None Needed
All Capital Funds Committed (including resources from this RFP)	Fourth quarter 2018
Financial Closing	First Quarter 2019
Begin Construction	Second Quarter 2019
Construction Completion	First Quarter 2020
Full Occupancy	Third Quarter 2020



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5. MEASURING SUCCESS.

	What are your objectives/indicators of success?	What are your projected measurable targets/goals?	How will you evaluate your program/collect data?
Outcome	Residents will maintain safe and appropriate housing.	Renovation of 38 rooms into 21 efficiency apartments	# of rooms renovated.



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Supporting Documents

1. Audited financial statement, tax returns and/or 990 for the past two years
2. Most current interim financial statements
3. Bios of key staff
4. Board list, including affiliations, for nonprofit applicants
5. IRS 501(c)3 Determination Letter for nonprofit applicants
6. Project Budget
7. Map of identified geographic project area, with the data described in the narrative portion of this grant proposal related to needs and opportunities in this area.
8. Schemes for Project

Attachment 2: Most current interim financial statements

Statement Of Activities Report

West Cook YMCA

For the year ended 12/31/2017

Account Number	Account Name	Actual	Budget	\$ Variance	Last Year	\$ Variance
Revenue						
0100	CONTRIBUTIONS	212,853	245,400	-32,547	213,953	-1,100
0300	SPECIAL EVENTS	90,373	75,000	15,373	62,095	28,278
0800	UNITED WAY	145	0	145	0	145
1000	GRANTS	472,290	365,928	106,362	487,908	-15,618
1010	PLEDGES	0	0	0	0	0
1100	MEMBERSHIP	1,662,111	1,618,695	43,416	1,556,576	105,535
1200	RESIDENCE INCOME	430,170	477,433	-47,263	497,333	-67,163
1300	HEALTH & FITNESS	70,903	144,375	-73,472	69,796	1,107
1305	BABYSITTING	3,134	4,450	-1,316	222	2,912
1307	PRESCHOOL	34,784	108,557	-73,773	78,932	-44,148
1310	AQUATICS	370,905	395,500	-24,595	365,094	5,811
1320	SWIM TEAM	248,069	226,000	22,069	222,579	25,490
1330	SPORTS PROGRAMS	30,740	45,678	-14,938	14,175	16,565
1335	DAY CAMP	134,591	158,947	-24,356	146,808	-12,217
1340	Y-KIDS	212,740	185,739	27,001	181,796	30,944
1345	FAMILY PROGRAMS	0	4,477	-4,477	1,652	-1,652
1348	SERVICE PROJECTS	0	0	0	2,960	-2,960
1350	ADMINSTRATION	56,158	26,000	30,158	46,887	9,271
1360	PARKING LOT INCOME (SOUTH COURT)	-3,210	0	-3,210	0	-3,210
1385	CDP Programs	2,249	0	2,249	0	2,249
1390	Unrealized Gain (Loss) on Investments	-6,859	40,000	-46,859	71,593	-78,452
1391	Realized Gain (Loss) on Investments	82,586	0	82,586	0	82,586
Total Unrestricted Revenue		4,104,732	4,122,179	-17,447	4,020,359	84,373
Total Temporarily Restricted Revenue		0	0	0	0	0
Total Permanently Restricted Revenue		0	0	0	0	0
Total Revenue		4,104,732	4,122,179	-17,447	4,020,359	84,373
Expenses						
2100	SALARY	1,940,795	2,052,817	112,022	1,952,458	11,663
2110	OVERTIME	21,532	0	-21,532	14,115	-7,417
2200	INSURANCE	160,880	174,721	13,841	164,307	3,427
2205	PENSION	125,241	125,403	162	92,996	-32,245
2300	FICA	141,690	157,042	15,352	141,790	100
2305	UC TAX	36,875	27,000	-9,875	23,984	-12,891
2400	CONTRACT SERVICES	354,965	303,190	-51,775	360,456	5,491

Statement Of Activities Report
West Cook YMCA
For the year ended 12/31/2017

Account Number	Account Name	Actual	Budget	\$ Variance	Last Year	\$ Variance
2405	LEGAL & AUDIT	35,123	31,800	-3,323	37,931	2,808
2500	SUPPLIES	157,750	147,880	-9,870	158,327	577
2505	OFFICE SUPPLIES	25,710	14,000	-11,710	13,475	-12,235
2540	PURCHASES FOR RESALE	1,477	3,100	1,623	85	-1,392
2550	SUBSCRIPTIONS	584	60	-524	58	-526
2600	TELEPHONE	21,377	20,400	-977	22,405	1,028
2700	POSTAGE	10,489	11,659	1,170	16,982	6,493
2800	UTILITIES	155,332	154,824	-508	162,860	7,528
2810	TAXES	2,357	1,600	-757	0	-2,357
2900	EQUIPMENT REPAIR	56,459	25,868	-30,591	60,739	4,280
3000	GRANT EXPENSE	90,681	78,520	-12,161	106,446	15,765
3100	ADVERTISING	97,661	91,186	-6,475	66,285	-31,376
3200	TRAVEL	107,253	70,570	-36,683	71,831	-35,422
3300	CONFERENCES	10,694	21,050	10,356	29,691	18,997
3400	EMPLOYEE TRAINING	12,334	29,070	16,736	12,417	83
3500	FAIR SHARE	62,461	65,424	2,963	57,542	-4,919
3510	DUES	3,458	5,465	2,007	6,277	2,819
3700	PAYROLL CHARGES	27,044	25,460	-1,584	22,139	-4,905
3710	BANK SERVICE CHARGES	44,090	54,000	9,910	46,224	2,134
3740	INTEREST EXPENSE	10,995	7,073	-3,922	4,408	-6,587
3760	INSURANCE EXPENSE	64,693	66,903	2,210	70,025	5,332
3800	PROGRAM EXPENSE	122,994	119,983	-3,011	120,210	-2,784
3805	PRINTING EXPENSE	132	2,400	2,268	22,830	22,698
3810	BAD DEBT EXPENSE	36,939	31,631	-5,308	30,271	-6,668
3900	MISCELLANEOUS EXPENSE	17,360	16,080	-1,280	12,517	-4,843
4000	DEPRECIATION	189,521	186,000	-3,521	169,389	-20,132
4100	RENT	11,940	0	-11,940	0	-11,940
Total Unrestricted Expenses		4,158,886	4,122,179	-36,707	4,071,470	-87,416
Total Temporarily Restricted Expenses		0	0	0	0	0
Total Permanently Restricted Expenses		0	0	0	0	0
Total Expenses		4,158,886	4,122,179	-36,707	4,071,470	-87,416
Change in Net Assets		-54,154	0	-54,154	-51,111	-3,043

Attachment 3

PHILLIP JIMENEZ

310 Forest Ave
River Forest, Illinois 60130

Phone: (312) 925-5688
E-mail: Phillip@westcookymca.org

SUMMARY OF QUALIFICATIONS

- Innovative, self-starter with proven development experience in a large human services organization.
- Launched brand awareness program to enhance market presence in constituent segments including congregations, corporations, civic organizations, and private individuals.
- Demonstrated ability to initiate, organize, and execute new programs and operations from concept through implementation.
- 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.
- Extensive supervisory experience including the hiring, training, and coordination of staff.
- Possesses strong facilitation, public speaking, presentation and mediation skills.

PROFESSIONAL EXPERIENCE

West Cook YMCA, Oak Park, Illinois
President and CEO

2014-Present

- Oversee overall operational responsibilities of the YMCA
- Lead and Develop Staff Team
- Provide Strong Fiscal Leadership
- Lead Fundraising Efforts
- Create a Culture of Excellence
- Act as an Ambassador for the Mission
- Develop and Implement a Strategic Plan

National Museum of Mexican Art, Chicago, Illinois
Vice President and Chief Operating Officer

2013-2014

- 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.
- Worked with the President and the Board for the long-term, strategic growth of the organization and its mission.
- Oversaw implementation of exhibits and programs to ensure that they are executed well and align with the strategic goals of the organization.
- 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.
- Managed nine direct level employees and management authority over approximately 25 additional.

San Miguel Schools, Chicago, Illinois
Vice President of Advancement

2010-2013

- Facilitated a 16% increase in total contribution revenue in first nine months.
- Increased revenues for the schools' marquis event by 28%, up from \$200,000 to \$260,000.
- Initiated the second largest operating gift in the history of the schools.
- Supported a board recruitment process for seven new board members. In addition, established an advancement project plan for every board member to promote donor solicitation.
- Established a Marketing and Fundraising Committee of the San Miguel Schools' Board.
- Initiated a marketing program for the schools.
- Increased the web pages and views by over 100% since the previous year.
- Coordinated the first digital annual report for the schools.
- In the last four months, positioned the schools on four major television stations in the Chicago metropolitan area.

Lutheran Child & Family Services, River Forest, Illinois 2002 - 2010
Director of Advancement

- Served as a key member of the management team with input into all institutional planning processes.
- Increased funds and program revenue through more efficient utilization of services.

- Integrated the development and marketing functions within the Advancement Department.
- Developed an integrated, statewide marketing program including a shift to a “branded house” strategy.
- Serve in leadership capacities such as the Vice President of the Lutheran Child and Family Services Foundation, led advancement function for Camp Wartburg, and the Co-Chair of the merger team with Chicago Uptown Ministries.
- Oversaw three marketing studies, including internal negotiations to ensure implementation, with Lipman-Hearne.
- Implemented department-wide cultural and procedural change which has yielded an annual budget increase of 60% since 2002.
- Built critical infrastructure for a comprehensive advancement program which now produces over \$1.8 million, including special events, major gifts, individuals, congregational cultivation, corporations, and foundations.
- Oversaw a donor portfolio of \$3million.
- Increased data gathering, management capabilities, and data utilization for constituent relationship management (CRM) system.
- Increased the Annual Fund by 98% and current donor pool by 42% during tenure.
- Planned and directed establishment of on-line giving, which has increased 630% from the implementation in 2003. The program currently produces more than \$50,000 on an annual basis.
- Created a stewardship and acknowledgment program in order to increase communication with high level donors to ensure an annual increase in gifts.
- Reorganized major gift program, yielding an increase of 200%.
- Implemented a Major and Planned gift program which secured 100% financial support by the Board of Trustees and the Foundation Board.

Ispat Inland, Inc., Chicago, Illinois

International Sales Manager, Mexico City, Mexico 1998–2001

- 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.
- Spearheaded and coordinated all facets of the start-up office in Mexico City, Mexico.
- Secured new accounts by increasing the customer base from 3 customers to 10. As a result, revenues increased from \$10 million to \$37 million on an annual basis.
- Established all aspects of the new office, including litigation, international trade, logistics, government negotiations, and the identification of suppliers and facilities.
- Developed and implemented a highly successful fiscal warehouse (Duty Free Zone) logistics system, which allowed Ispat Inland to secure future business from new accounts and increase market share.

Sales Representative, Chicago, Illinois 1994–1998

- Chaired the company’s first ever Empowerment Movement Program, concerned with diversity and sensitivity issues.
- Conducted training classes and presentations.
- Increased the market share within existing accounts.
- Expanded underdeveloped markets such as the appliance and magnetic steel markets.
- Transferred to the International Team in 1995 to manage accounts in Mexico.
- Conducted domestic and international logistics, shipping and INCO Terms.
- Received advanced executive training on negotiation processes.
- From 1994 to 1995, managed the Nissan Account which included oversight of orders, shipping, relations, account management, customer satisfaction, and related duties.

EDUCATION

NORTHWESTERN UNIVERSITY, Evanston, Illinois

1994 –1996

Studied Japanese Language and Culture (Continuing Education)

UNIVERSITY OF WISCONSIN, Madison, Wisconsin

1993

Bachelor of Arts Degree in Political Science

Emphasis: Management and Marketing

Academic Achievement Award: Spring Semesters 1991 and 1992

PROFESSIONAL TRAINING AND EDUCATION

NORTHWESTERN UNIVERSITY, Evanston, Illinois 2006

Kellogg School of Management, Center for Nonprofit Management

Certificate of Professional Achievement in Nonprofit Management

LC-MS Certified Planned Gift Specialist 2003

Series 6 and 63 Trading Licenses Holder

COMMUNITY SERVICE / LEADERSHIP

- Oak Park / River Forest Community Foundation
Board of Directors & Governance & Nominee and Grant & Program Committee 2012 – Current
- AFP Ethics Committee
Committee Member 2012 – Current
- Oak Park/River Forest Community of Congregations
Board of Directors Member 2014 - Current
- School District 97 – Oak Park Parent Engagement Task Force
Committee Member 2016 – Current
- NBC / Telemundo - Community Action Board
Board Member 2015 – Current
- Oak Park/River Forest Rotary Club
Member 2014 - Current
- Safer Foundation, Chicago, Illinois
Board of Directors Member & Development Committee member 2012 - Present
- Latino Giving Circle-Fund of the Chicago Community Trust, Chicago, Illinois
Board Co-Chair and Chair of Membership Committee 2008 - Present
- Mujeres Latinas En Acción Emeritus Board Member, Chicago, Illinois 2009 - Present
- Hope for Grieving Children in Africa, Chicago, Illinois
Founding Board Member 2007 - 2010

LANGUAGES

Fluent in Spanish (written and spoken) and conversational Japanese



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Attachment 4: 2018 West Cook YMCA Board List

Board Officers

Officer	Name	Title	Organization
2020 Chair	Paul Koester	President	The Koester group, Inc.
2019 Immediate Past Chair	Perry Vietti	President	Interfaith Housing Development Corp.
2020 Treasurer	John Norton	Retired	
2019 Secretary	Teresa Powell	Retired	

Board members

Name	Title	Organization
2018 Sara Cano	Marketing Director	Tribune Publishing/Hoy
2019 Michael Carioscio	Chief Information Officer	Oak Park and River Forest High School, District 200
2018 Tom Ewert	Retired	Apartment Building Owner
2018 John Harris	Principal	A5 Group, Inc.
2020 Terrence Roche	Senior Vice President	Enterprise Strategy at Kellen
2019 Dr. Scott Yen	Physician, Medical Director for Residency - West Suburban Medical Center	Chicago Health Medical Group

Internal Revenue Service

Department of the Treasury

District
Director

AUG 25 1990

Person to Contact: EO:TPA

Telephone Number: 1-800-424-1040
312-435-1040THE YOUNG MENS
CHRISTIAN ASSOCIATION OF
OAK PARK ILLINOIS
255 SOUTH MARION STREET
OAK PARK, IL 60302-3193

Refer Reply to: 90-2025

Date: August 23, 1990

RE: THE YOUNG MENS CHRISTIAN ASSOCIATION OF OAK PARK ILLINOIS
EIN: 36-2179780

This is in response to the letter, dated July 6, 1990, regarding your status as an organization exempt from Federal income tax.

Our records indicate that a ruling letter was issued in December, 1944, granting your organization an exemption from Federal income tax under the provisions of Section 501(c)(3) of the Internal Revenue Code of 1954. Our records also indicate that your organization is not a private foundation but one that is described in Section 509(a)(1) & 170(b)(1)(A)(vi) of the Internal Revenue Code.

Contributions made to you are deductible by donors in computing their taxable income in the manner and to the extent provided in Section 170 of the Internal Revenue Code.

If your gross receipts each year are normally \$25,000 or more, you are required to file Form 990, Return of Organizations Exempt from Income tax by the fifteenth day of the fifth month after the end of your annual accounting period.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under Section 511 of the Code. If you are subject to this tax, you must file an income tax return on F-990-T.

If any question arises with respect to your status for Federal income tax purposes, you may use this letter as evidence of your exemption.

This is an advisory letter.

Sincerely yours,

R. S. Wintrode, Jr.
District Director



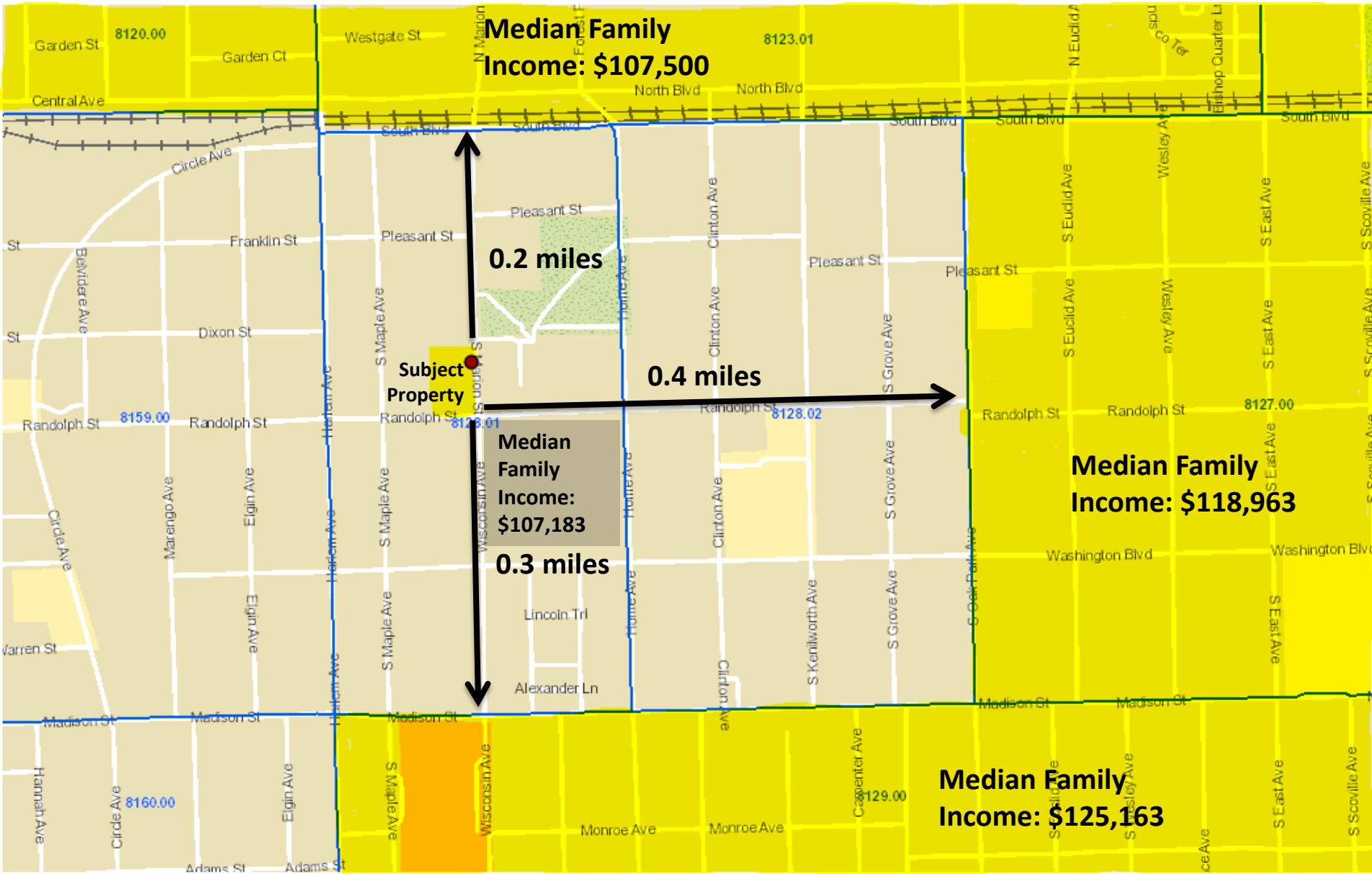
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Attachment 6- Project Budget

Capital Sources	Amount
Village of Oak Park Impact Funding	\$750,000
Other Sources, including Private Foundations and/or loans	\$750,000
Total	\$1,500,000

Capital Uses	Amount
Hard Costs (Construction)	\$1,350,000
Soft Costs	\$150,000
Total	\$1,500,000

Attachment 7: Map



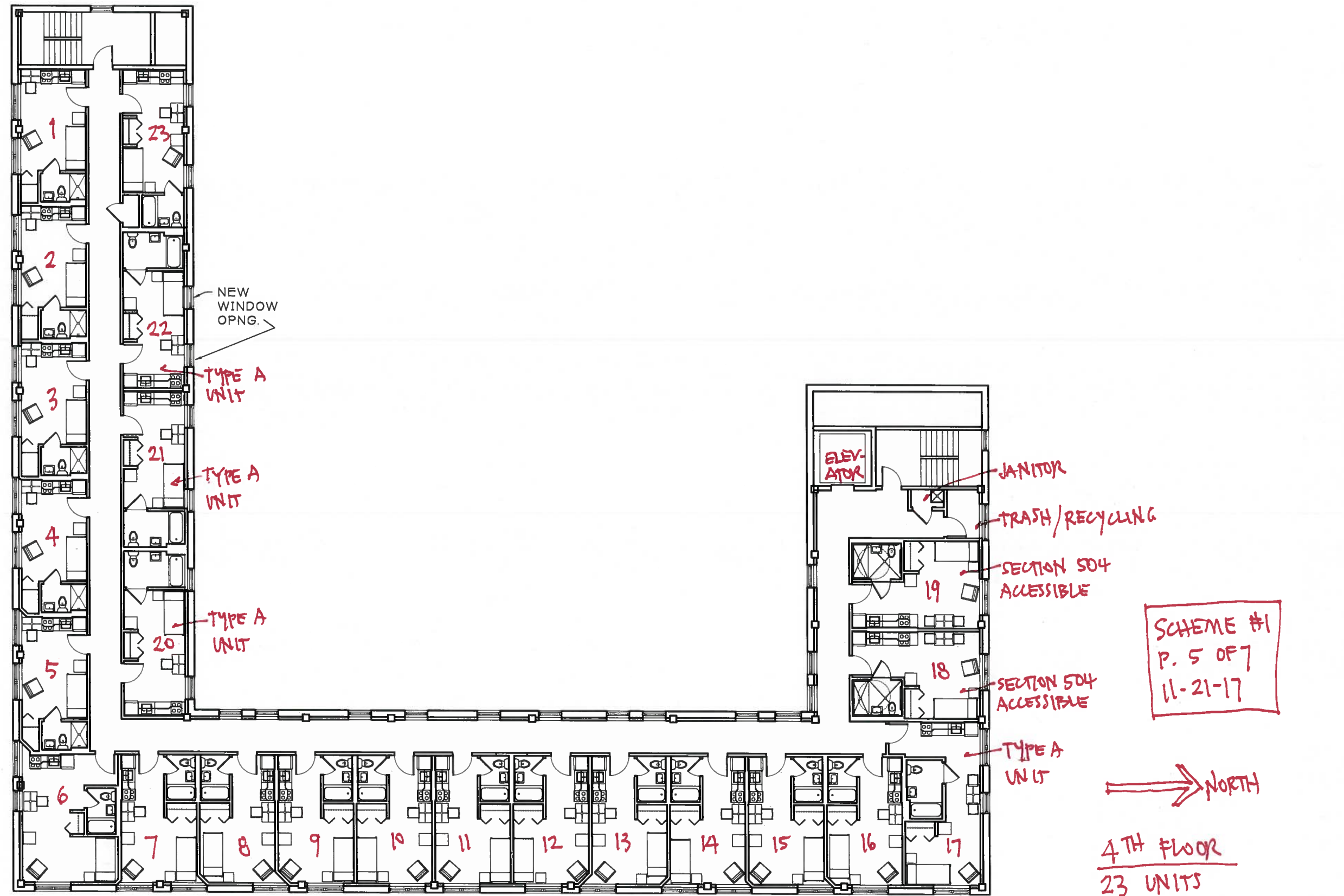
Opportunity areas proximate to Subject Property are highlighted in yellow.

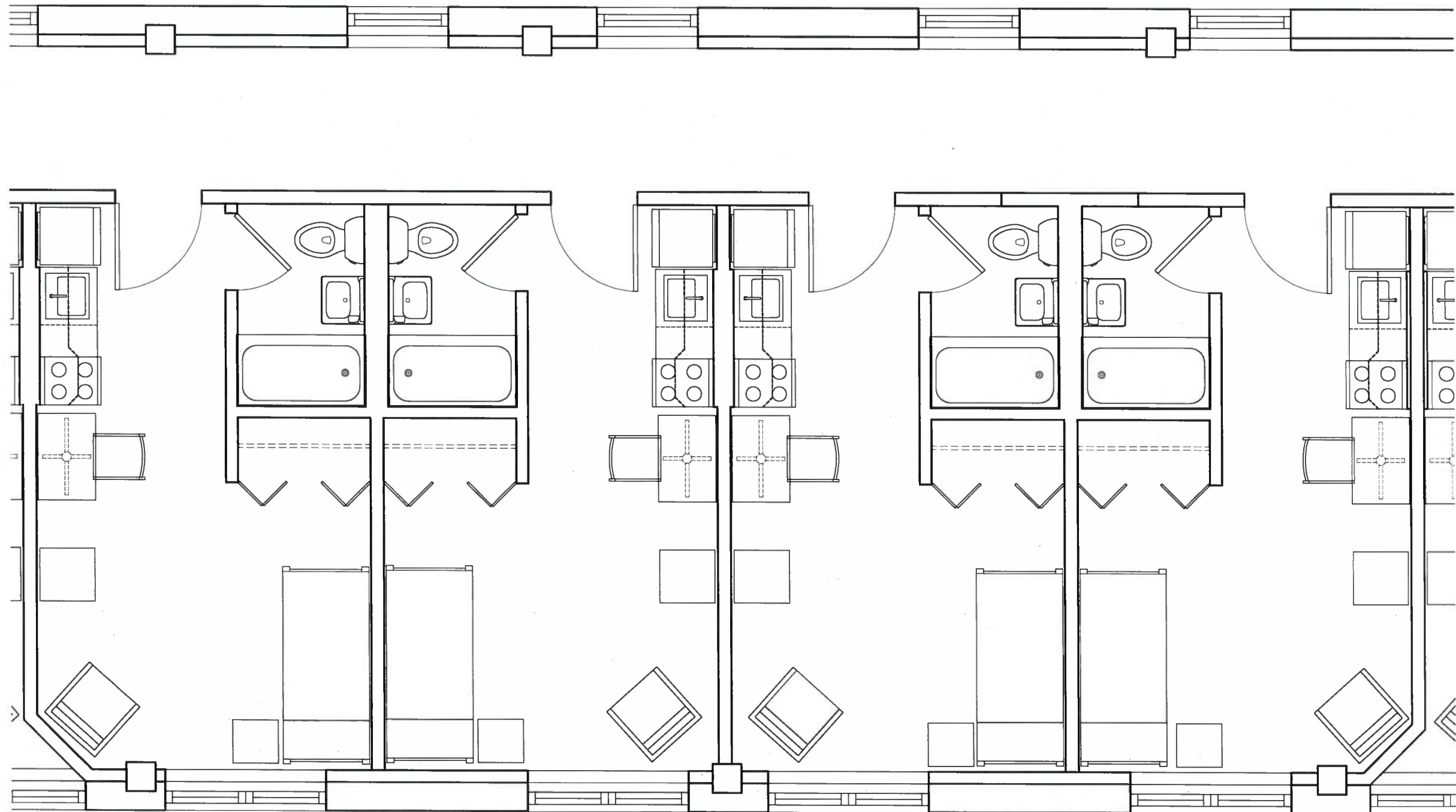


Public Services and Community Amenities in proximity to West Cook Y Apartments

1. Full Service Grocery Store: Whole Foods Market
2. Fixed-Route Public Transportation: Harlem/Randolph Pace Bus Stop
3. Retail Store: Bed Bath & Beyond
4. Government Services: Housing Authority of Oak Park
5. Recreational Facilities: Mills Park
6. Pharmacy: CVS Pharmacy
7. School: Gwendolyn Brooks Middle School
8. Restaurant: Barclay's American Grill
9. Hospital: Rush Oak Park Hospital
10. Religious Institution: Forest Park Baptist Church
11. Library: Oak Park Public Library
12. Post Office: U.S. Post Office
13. Banking Institution: Citibank
14. Day Care Facility: Oak Park and River Forest Day

Attachment 8: Schemes for Project





TYPICAL UNITS @ EAST SIDE OF BUILDING: 240 SQ. FT.
 $\frac{1}{4}'' = 1'-0''$

SCHEME #1
 P. 6 OF 7
 11-21-17