EFFINITY

Relationship-based culture for organizational harmony

A Metropolitan Ministries Social Enterprise

2018-2019 Social Enterprise Plan Competition
Children’s Board of Hillsborough County
August 3, 2018

Effinity
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Executive Summary

Effinity is a new social enterprise launched by Metropolitan Ministries, a 501(c)3 not-for-profit Florida Corporation. Effinity provides organizational coaching and training in the areas of trauma-informed care, compassion fatigue, and emotional intelligence. Trainings offered include: Introduction to Trauma Informed Care; Skills and Tools for Working with Trauma; Trauma Informed De-Escalation; Compassion Fatigue; Trauma Informed Supervision; Trauma Informed Performance Evaluations; and Leading Trauma Informed Change. Standard trainings are 3-4 hours. Training packages can be expanded to include organizational assessments, technical assistance with implementation, and follow up coaching and program evaluation.

Effinity will position itself as a high-quality and reliable training provider that furthers the mission of the customer’s organization as well as MM’s mission of helping homeless and at-risk of becoming homeless people to achieve self-sufficiency.

Effinity will market to hospitals and health systems, child support organizations, elder care facilities, educational systems and institutions, childcare providers, and other care giving organizations. The trainings will be advertised as a way for organizations to promote leadership development, improve team dynamics, and build a high-performing organizational culture, while also improving outcomes for clients and customers.

Effinity is led by Director Jamie Meyer, a 20 year veteran of MM who has several years of experience providing trauma-informed training to organizations throughout the country. Effinity will be supported by a team of faculty trainers, as well as MM’s Marketing, HR and Accounting staff. MM’s Board of Director’s Social Enterprise Committee will provide oversight and guidance for Effinity.

Effinity will leverage Metropolitan Ministries’ core competencies, including: MM’s trusted relationship with the Tampa Bay community; accreditation in the Sanctuary Model of Trauma Informed Care; skilled and experienced staff members who will deliver trainings; robust community partnerships; and an expert Marketing team with experience in building a social enterprise brand.

This training enterprise will provide a social return on investment by:

- Transferring best practices and knowledge to other organizations that will improve employee culture, service delivery, and client/customer outcomes.
- Building a Trauma-informed Tampa Bay community that prevents the most vulnerable from being re-traumatized on their journey to achieving self-sufficiency.
- Providing unrestricted income to support MM’s trauma-informed counseling and education programs that benefit homeless and at risk children and families.
- Creating employment and internship opportunities for graduates of Metropolitan Ministries’ self-sufficiency program.

Effinity will generate a profit in its fifth year of operation. To account for the first several years of operating at a loss, MM will apply for grants and solicit donations and sponsorships from individual donors, foundations, and corporations.
Description of Social Enterprise Venture

Effinity is a social enterprise venture launched by Metropolitan Ministries (MM), a non-profit that serves over 27,000 homeless and at-risk families yearly throughout Tampa Bay. Effinity offers organizational coaching and trainings that provide companies with a framework for understanding and addressing trauma and stress. This unique training enterprise is the culmination of Metropolitan Ministries’ more than 45 years of experience in responding to the evolving needs of the community, and most recently, a five-year journey of becoming an accredited trauma-informed care agency.

In 2009, in the midst of a difficult recession that saw rates of unemployment and homelessness rapidly increase, Metropolitan Ministries knew more must be done to meet the growing need. A campus expansion plan— including a new family residence facility for an additional 49 families and 9 single women, a counseling center, a chapel, and a youth enrichment center—evolved and came to fruition. With new buildings and increased capacity, the executive leadership and board desired to put more tools and best practices in place to move towards the lofty goal of becoming America’s most effective caregiver for poor and homeless families. Chief Programs Officer Christine Long became interested in Trauma Informed Care as a way to improve client outcomes, and after three years of growth and change, Metropolitan Ministries became certified in the Sanctuary Model of Trauma Informed Care by the Andrus Institute. Following this certification, there has been an increase in successful outcomes for clients, increased retention for staff, and MM has been named as one of Tampa Bay’s Top Workplaces every year since implementation began. The vision for implementation of trauma-informed care in all of our residential and community-based programs is that in training staff, volunteers and clients we would be a leader in community change throughout Tampa Bay. Each person whose life has been transformed through trauma-informed care has the opportunity to share that approach within our larger community.

The above results support a growing body of evidence that indicate a trauma-informed approach leads to improved employee culture, increased success rates for children and families, and long-term organizational and business success. As such, Effinity pairs highly skilled trainers with evidenced-based, trauma-informed content that elevates standard organizational trainings to transformative learning experiences. Trainings offered include: Introduction to Trauma Informed Care; Skills and Tools for Working with Trauma; Trauma Informed De-Escalation; Compassion Fatigue; Trauma Informed Supervision; Trauma Informed Performance Evaluations; and Leading Trauma Informed Change. Trainings range in duration from 1-2 hours to consecutive day-long sessions depending on the needs of the customer. Training packages can be expanded to include organizational assessments, technical assistance with implementation, and follow up coaching and program evaluation.

Effinity leverages the experience and expertise of MM’s staff to provide customized organizational coaching and trainings from a direct experience perspective. As a result, Effinity helps executive leaders and staff to understand how trauma affects them, as well as their employees and clients. Effinity, beyond providing a valuable and needed service to clients, is a socially conscious business that benefits vulnerable families throughout Tampa Bay. In addition
to creating a trauma-informed community by educating care providers, this business will
generate positive cash flow to support MM’s trauma-informed counseling and education
programs.

Our **VISION** is to operate an organizational coaching and training business that will 1) provide
personalized and specialized coaching and training opportunities for other businesses, nonprofits,
and healthcare organizations to learn about the trauma-informed approach, 2) create a trauma
informed community across Tampa Bay that prevents the most vulnerable from being re
traumatized on their journey to self-sufficiency, and 3) track improved organizational outcomes
for trainees in order to generate repeat and new customers.

Our **MISSION** at Metropolitan Ministries is to care for the homeless and those at risk of
becoming homeless in the community through services that alleviate suffering, promote dignity,
and instill self-sufficiency ...as an expression of the ongoing ministry of Jesus Christ. The
Ministries does not proselytize and serves all in need. Effinity will support this mission by
educating other organizations in best practices and evidence-based strategies that are proven to
increase client and organizational success. Effinity aligns with the Children’s Board focus area of
Supported and Supportive Families.
Industry and Market Analysis

Overview
Mounting research documents the business value of emotional intelligence and a trauma-informed approach. As a result, it has become increasingly common for companies to seek out these trainings to promote leadership development, improve team dynamics, and build a high-performing organizational climate. Businesses that provide care giving services in Hillsborough and surrounding counties, like hospitals and elder and child care facilities, often have minimal training in Trauma Informed Care. Currently there is a handful of options for receiving Trauma related training in Tampa Bay. Few of these training options provide companies with continuing education credits, and even fewer offer companies a customizable training platform. Effinity’s analysis indicates that there is a niche market for a training business to provide companies and their employees with the information and skills needed to incorporate trauma-informed practices into their work and organizational structure.

Target Market and Segmentation Strategy
Effinity will market to Tampa area businesses and other organizations seeking to incorporate evidence-based and trauma-informed practices into their work through customizable training experiences. Effinity will focus on hospitals and health systems, child support organizations, elder care facilities, educational systems and institutions, childcare providers, and other organizations involved in trauma treatment. Tampa has 17 major hospitals and health systems, nearly 100 assisted and independent living facilities, and over 26 not for profit organizations serving children. All of these businesses and organizations provide care to at-risk and vulnerable populations that will benefit from trauma informed care through improved company culture and client outcomes.

As part of the growing Professional and Management Development Training Industry, national market research suggests it is an excellent time to pursue this business. Total market revenue for the industry has a projected sales growth rate of 2.4 percent between 2017 and 2021. By 2021, the market is expected to be worth $13.2 billion (IBISWorld, 2016). The industry is in its growth stage, and it should grow faster than the U.S. economy through 2021. At this stage in the life cycle, corporations are increasingly recognizing the high value provided by training programs for their employees, and, at the same time, training providers are rapidly expanding to provide new products, courses and study platforms.

Competitive Analysis
Effinity identified 13 businesses/organizations nation-wide that offer trainings with a trauma informed approach. Only 6 of these businesses offer a customized approach, working with the client to identify organizational needs and designing a training in response to those needs. The National Institute for Trauma and Loss in Children and T3 are both national professional development businesses that offer customizable online and on-site trainings. While these businesses offer similar trainings, they do not have the name recognition and trusting relationship with the Tampa Bay community that MM has built over the last 46 years. Within the state of Florida, there are 4 organizations that offer Trauma Informed Care training; 2 of these organizations, The Florida Center and the Center for Child Counseling, offer trauma training only to childcare providers, and not to general social services or healthcare agencies. The other 2
organizations in Florida are the Tampa Trauma Education Center and Barry University Center for Human Rights and Social Justice. The Tampa Trauma Education Center is a brand new organization founded in 2017 that is an affiliate of the Green Cross Academy of Traumatology. The goal of this organization is to provide counselors, students, and other individuals with psychological first aid training so they can respond to domestic and international crises with the Green Cross. The Center for Human Rights and Social Justice provides Trauma-Informed Care Training and Consultation in a similar format to that of Effinity and also offers custom training and consultation to a diverse array of local, regional, and national agencies, institutions, and organizations. Unlike Effinity, this organization only offers Trauma Informed Care training and not an array of complementary trainings like compassion fatigue and de-escalation. While these organizations are direct competitors, none of them can offer the expertise, variety, and community knowledge like Effinity.

Effinity will leverage the following factors to distinguish itself and create a competitive advantage: quality of service and expertise; niche marketing strategy; reputation; ability to adapt to consumer's changing needs; and accreditation. The business will capitalize on MM’s existing resources, including highly qualified and experienced on-staff trainers, pro-bono and skilled volunteers, and a marketing team with documented success. Further, in 2016, MM concluded the three year trauma informed care accreditation process. MM’s organizational and service outcomes demonstrate the effectiveness of the trauma-informed approach, helping other organizations to see the potential benefits and return on investment from training opportunities.
Marketing Plan Summary

Objectives:
- Educate health care, elder care, child care, and other organizations throughout Hillsborough County on trauma and how specialized training leads to improved organizational outcomes
- Offer consultation, training, implementation, and evaluation services designed to support organizations and businesses in a personal and holistic way
- Convey the message that Effinity will help homeless and at-risk individuals by leveraging revenue to provide additional trauma-informed education and counseling services
- Effinity will be known to offer transformative trainings delivered by subject matter experts

Product/Service Distribution
Effinity provides a suite of services designed to meet the needs of each organization or business.

<table>
<thead>
<tr>
<th>Trainings/Additional Services</th>
<th>Length</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Consultation</td>
<td>30 minutes</td>
<td>Free</td>
</tr>
<tr>
<td>Understanding Trauma Informed Care</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Skills and Tools for Working with Trauma</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Trauma Informed De-Escalation</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Trauma Informed Organizational Change</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Compassion Fatigue</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Understanding Poverty and Homelessness</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Trauma Informed Diversity</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Trauma Informed Supervision</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Conflict Resolution</td>
<td>½ day (1 unit)</td>
<td>$1,200</td>
</tr>
<tr>
<td>Custom Training</td>
<td>Daily</td>
<td>$2,000</td>
</tr>
<tr>
<td>Implementation Consultation</td>
<td>Hourly</td>
<td>$100-150</td>
</tr>
<tr>
<td>Evaluation Services</td>
<td>Hourly</td>
<td>$100-150</td>
</tr>
<tr>
<td>Coaching Services</td>
<td>Hourly</td>
<td>$100-150</td>
</tr>
</tbody>
</table>

Following are the steps a customer follows to make a purchase:
1. Prospect will contact Effinity by email or phone and will be provided with a complementary consultation.
2. Based off of the consultation, Effinity will submit a proposal to the customer.
3. Effinity will send a survey to participants partaking in the training seminar.
4. Effinity will utilize results to further customize the agreed upon training.
5. Effinity will confirm dates and logistics.
6. Effinity faculty will deliver trainings, and will collect evaluations upon the conclusion of each training session.
7. Effinity will provide implementation and evaluation services upon request.
Positioning
Effinity will be a reliable and effective resource for organizations and businesses looking to improve company culture, increase employee retention, and elevate their quality of services. Faculty Trainers have extensive experience in providing trauma-informed services that have resulted in the above mentioned outcomes. We see our trainers’ breadth and depth of understanding as a differentiator among the other training options available.

Pricing
Effinity’s pricing is based off of daily rates for group trainings and hourly rates for consulting services. It offers on-site trainings at a daily rate of $2,000, with the majority of standard trainings priced at $1,200 for half a day. Hourly consulting rates range from $100-150, depending on the consultant’s experience and knowledge. This rate is in line with consulting and training rates in this field.

Promotion and Sales
Effinity will raise and sustain customer awareness of consultation and training services through a website, digital marketing strategy, and a referral program.

-Website and Brand Identity- During months 1-3, a company website will be constructed by MM’s Marketing team and will provide comprehensive information about our approach, trainings offered, and biographies for trainers. The website will have contact information as well as a contact form for visitors to request additional information. The brand identity will also be developed and print marketing such as brochures will be produced.

-Digital Marketing Strategy- To date, Jamie Meyer (Director) has only advertised her training services through word-of-mouth by previous clients and has not yet engaged in using other marketing tools such as online promotion, SEO, social media marketing, email, mobile, and paid search tools. These tools will be powerful to help promote the organization’s services to people at a local level as well as regionally. During months 3-6, MM’s Marketing Department will create, update, and manage social media accounts for Effinity. In particular, social identities such as Twitter and LinkedIn will be used to market the business to other companies. During months 6-12, a digital ad campaign will be used to generate leads, and the website will be expanded upon to include professional photography and testimonials. During year 2, the digital ad campaign will be furthered and a video testimonial will be developed.

-Referral Program- Effinity will instate a referral program, which has been shown to lead to more loyal customers, lower marketing costs and increased revenue. This program will enable customers to become brand ambassadors and spread free word-of-mouth marketing on behalf of the organization. Also, MM’s President and CEO Tim Marks is a member of local CEO councils and other leadership and business organizations, which will provide an existing business network for referrals. MM also hosts Corporate Immersion experiences during which different companies learn about poverty and homelessness and participate in service learning experiences across MM’s campus; this is another opportunity to market Effinity’s training services.

Effinity will also market to Human Resource Managers and Department Heads/Managers for care-giving organizations (non-profit and for profit) that work in mid to high trauma environments. The marketing plan will highlight the following benefits to Effinity’s custom trainings:
- Talent acquisition and retention
- Improved Corporate Culture
- Increased Organizational Agility
- Return on Investment
- Improve Bottom Line
- Alignment of Learning and Development Goals with

organizational Business Goals (custom approach)

- Training Content meets clients/customers where they are (custom approach survey)
- Experienced and expert trainers
- Employee benefit (long term skill set)

Effinity will also be promoted at local community events and relevant conferences. The Metropolitan Ministries Marketing team will handle all public relations functions. They will also be responsible for designing and maintaining the website, creating marketing campaigns, designing digital and print marketing materials, and other marketing functions.

Effinity’s sales forecast is listed below:

<table>
<thead>
<tr>
<th>Month Year</th>
<th>Units</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 2018</td>
<td>3 x $1200</td>
<td>$3,600</td>
</tr>
<tr>
<td>November 2018</td>
<td>3 x $1200</td>
<td>$3,600</td>
</tr>
<tr>
<td>December 2018</td>
<td>3 x $1200</td>
<td>$3,600</td>
</tr>
<tr>
<td>January 2019</td>
<td>3 x $1200</td>
<td>$3,600</td>
</tr>
<tr>
<td>February 2019</td>
<td>3 x $1200</td>
<td>$3,600</td>
</tr>
<tr>
<td>March 2019</td>
<td>3 x $1200</td>
<td>$3,600</td>
</tr>
<tr>
<td>April 2019</td>
<td>4 x $1200</td>
<td>$4,800</td>
</tr>
<tr>
<td>May 2019</td>
<td>4 x $1200</td>
<td>$4,800</td>
</tr>
<tr>
<td>June 2019</td>
<td>6 x $1200</td>
<td>$7,200</td>
</tr>
<tr>
<td>July 2019</td>
<td>6 x $1200</td>
<td>$7,200</td>
</tr>
<tr>
<td>August 2019</td>
<td>6 x $1200</td>
<td>$7,200</td>
</tr>
<tr>
<td>September 2019</td>
<td>6 x $1200</td>
<td>$7,200</td>
</tr>
<tr>
<td>Year End</td>
<td>50 Units Total</td>
<td>$60,000</td>
</tr>
</tbody>
</table>
Management Plan Summary

Effinity will be a division of Metropolitan Ministries, Inc., a 501(c)(3) Florida nonprofit Corporation founded in the State of Florida in 1972. Effinity will be one of Metropolitan Ministries’ social enterprise initiatives and will be an essential component to fulfilling the vision of becoming America’s most effective caregiver for poor and homeless families.

The staffing structure for Effinity is:
- 1 Director (half-time in year 1, full time in year 2)
  - Compensated by salary
- 2-4 Faculty trainers (part-time contract)
  - Must have prior training experience, program experience, training for practices and branding, will be compensated by per training fee
- 1 AmeriCorps VISTA (full time) for sales and customer service in year 1
  - Must have sales and/or customer service training and training on brand, compensated by AmeriCorps stipend
- 1 MM client graduate part-time in year 2 and full-time in year 3 for sales and customer service
  - Must have sales and/or customer service training and training on brand, will be compensated hourly + benefits
- MM Staff Support to include marketing and accounting departments.

Management Team

-Director- MM’s Senior Director of Education Programs, Jamie Meyer, will serve as Director of Effinity and will report to MM’s Chief Programs Officer, Christine Long. She is one of Metropolitan Ministries’ lead trainers for the Sanctuary Trauma Informed Care model and is a Compassion Fatigue Educator through the Tend Academy. She holds a bachelor's degree in psychology from Anderson University and a master’s degree in school psychology from the University of South Florida. She has served at Metropolitan Ministries for 20 years where she has developed dynamic and interactive trainings for staff and community groups to increase awareness of issues of poverty and homelessness, trauma and self-care. Jamie serves on the Ministries’ leadership team and oversees Metropolitan Ministries’ education programs including the PromiseLand Early Childhood Center, school-aged children’s activities, youth programs and adult education.

As one of Metropolitan Ministries most tenured staff, Jamie Meyer has a track record delivering program outcomes and successful trainings, which she has offered throughout the US. She has represented MM in various local, state and national conferences and most recently gave a Ted talk at the TEDxUSF event in April 2018 focusing on the topic of Trauma Informed Care (title: Changing the Question from “What’s wrong with you?” To “What happened to you?”). Her key responsibilities to Effinity are as follows:

- Develop and deliver coaching models and approaches
- Develop and deliver training curricula
- Ongoing research of best practices
- Design integrated models of training using multiple learning modalities
- Conduct organizational analysis to develop customized coaching and training plan
- Collect evaluation data
• Conduct pre and post surveys of coaching clients and training participants
• Represent Effinity in the Hillsborough County community
• Nurture partner relationships to develop training and coaching opportunities
• Speak at local, state and national conferences
• Manage all training faculty and AmeriCorps VISTA
• Leads the strategic planning of Effinity
• Report outcomes to the Social Enterprise committee of MM’s Board of Directors

-Financial Manager- MM’s Chief Financial Officer, Amy Kern, will serve as Financial Manager and will report to MM’s President & CEO. Amy has an MBA and a Master of Science in Accounting from the University of Phoenix. She has 14 years of corporate accounting experience in publicly traded companies and not-for-profit organizations, including Miami Rescue Mission and Habitat for Humanity. She is certified as a Microsoft certification as a Certified Solutions Associate, as evidenced by her ability to transform raw data into meaningful metrics to facilitate educated decision making. She leads the Finance and Accounting Team which also includes agency process improvement. She has been with MM since 2014 and is charged with management of all funds to ensure that gifts and grants are prudently used in the furtherance of our mission. Amy will use her extensive experience in for profit and not for profit finance to manage Effinity’s accounting and budgeting and to prepare financial statements.

-Social Enterprise Oversight
- MM’s Chief Programs Officer, Christine Long, will serve in an oversight function for Effinity and will report to MM’s President & CEO and Board of Directors. With over 23 years of experience in providing services to the homeless, Christine Long has a Bachelor’s Degree in Psychology from The University of South Florida and a Master’s Degree in Mental Health Counseling from Nova Southeastern University. She serves on the Board for the Florida Housing Coalition and has been an active member of the Florida, Hillsborough and Pasco County Homeless Coalitions serving in many capacities, including the Board of Directors for 6 years, Secretary on the Executive Committee and chairing several committees and sub-committees throughout the years. Christine serves on the Hillsborough County Emergency Food and Shelter Board, the inaugural board of Tampa Bay Area Network to End Hunger, is a member of Humana Bold Gold Health Advisory Board and Hillsborough Community College Advisory Board.

-MM’s Board of Director Social Enterprise Committee will also provide oversight and guidance. The Social Enterprise Committee consists of 9 Board members and 11 Ad Hoc members who contribute their legal, financial, and business expertise to MM’s social enterprises.

Effinity Personnel
-Faculty Trainer- Beth Orr, a Licensed Mental Health Counselor functioning as Senior Director of Clinical Services at MM, will serve as a trainer for Effinity. Beth has over 15 years of experience leading trauma informed and rapid culture change and growth within multi-disciplinary environments. Beth is a National presenter on: Trauma Informed Care in the Homeless Setting; Organizational and Programmatic Considerations and Design; Counseling Services with Children and Families in the Homeless Setting; Evidence-based Practices and Trauma Counseling; Family Resources and Advocacy Considerations with family members who have mental health diagnoses; and Uplift U – Holistic self-sufficiency program for homeless families and single women.
Her key responsibilities to Effinity are as follows:

- Develop training curricula specific to trauma informed clinical practices
- Ongoing research of best practices in trauma informed clinical practices
- Design integrated models of training using multiple learning modalities
- Collect evaluation data
- Conduct pre and post surveys of coaching clients and training participants

**Faculty Trainer** - Janelle Stewart, currently working as a consultant to Metropolitan Ministries, will serve as a trainer for Effinity. Janelle has over 13 years of experience working with children and holds a Bachelor’s Degree in Science and Early Childhood Development. She has worked with community organizations throughout her career such as YMCA, Palm River CDC, Head Start, and, Metropolitan Ministries. Early in her career, Janelle realized that children cannot develop appropriately without family and community support. Janelle served as the Director of Metropolitan Ministries’ Childcare Center, PromiseLand. During her tenure at Metropolitan Ministries, Janelle taught a research based parenting curriculum that included: Circle of Security and Emotion Coaching. Janelle created the Early Childhood Therapeutic curriculum implemented within Promiseland to mitigate the effect of trauma in young children at the center. In addition, Janelle helped develop the Promiseland Executive Function intervention program, a common challenge for homeless children.

Her key responsibilities to Effinity are as follows:

- Develop training curricula specific to trauma informed clinical practices
- Ongoing research of best practices in trauma informed clinical practices
- Design integrated models of training using multiple learning modalities
- Collect evaluation data
- Conduct pre and post surveys of coaching clients and training participants

**Training and Service Coordinator** - This position will be responsible for managing sales, coordinating trainings, and providing customer service for Effinity. This position will be filled by an AmeriCorps VISTA member during the first year of operations. MM has run an AmeriCorps VISTA (Volunteers in Service to America) program for 7 years and utilizes these year-long volunteers to build organizational capacity and generate financial, in-kind, and volunteer resources. Following the first year of business operations, this position will be filled by a resident of one of MM’s shelter or housing programs.

**Staff Support** - All support functions such as marketing and accounting will be provided by MM’s existing administrative staff. The Staff will report through the existing Metropolitan Ministries’ organizational structure, with additional oversight from the Social Enterprise Director.

There is a sufficient supply of faculty trainers within MM to support the operations of Effinity. Additional MM staff will be trained and educated to become Faculty Trainers during the first year of business in order to meet projected future growth needs.

Organizational structures for Metropolitan Ministries and Effinity are found in Appendix D and E.
Operational Plan

Effinity will provide trainings to human service and health care organizations and other businesses. Trainings have been and will be developed by “Effinity” and Metropolitan Ministries Staff. CEU Certification will be pursued for training courses.

The Social Enterprise will conduct its daily operations at Metropolitan Ministries’ Tampa location at 2002 North Florida Avenue. This is a typical business office facility. Desks and office supplies are provided by Metropolitan Ministries. The Staff involved in this venture will be the Senior Director of Education who will be the lead trainer, a Licensed Mental Health Counselor, and an expert consultant in children’s therapeutic interventions. An AmeriCorps Vista position will provide coordination support.

All Social Enterprises are also supported and guided by a Social Enterprise committee composed of Metropolitan Ministries’ board members with related expertise.

Equipment needed to support the staff will be 2 new laptop computers, a printer and an audio speaker set. Marketing materials will be developed (brochures, business cards, etc.); display boards for conferences, and an update of the training portion MM’s website which will also be a valuable asset for information purposes. Effinity will also utilize a software program titled Polls Everywhere for instant communication with attendees during a presentation.

Core Competencies:

High Quality Services-MM has a reputation for designing and providing high quality services with successful outcomes. These programs include our residential programs which house 124 families nightly on 2 campuses, our First Hug intervention program for homeless families and our C.R.E.A.T.E after school program for homeless and at risk children.

Trauma Informed Care-TIC is a treatment and organizational change model that integrates trauma theory with the creation of therapeutic communities which provide safety for both clients and the staff that works with them. MM is a Sanctuary Certified Trauma Informed Care Agency.

Community Trust & Community Building – MM is one of the most trusted and recognizable non-profits in the Tampa Bay area, and consistently maintains a high quality rating on Charity Navigator. MM brings the community together by allowing volunteers to serve clients directly, and the vast majority of volunteers return to serve again. This speaks volumes about the community’s trust in MM and ability to market its mission, values, and vision to the community. MM’s Marketing team will tie Effinity’s brand to the established and well known reputation Metropolitan Ministries has in the community.

Knowledge and Technical Assets:

Skilled Trainers- MM utilizes a highly educated staff with Master’s Degrees in providing trainings. MM has been named a Best Work Place in Tampa Bay for the last 6 years. MM’s Leadership has scored high marks in Social Enterprise skills in aptitude tests and has successfully developed the “Inside the Box” Social Enterprise with support of the Children’s Board Competition.
Marketing Department: MM’s marketing departments has been recognized for their work in Hillsborough County; the team has received 4 Marketer of the Year awards, which recognizes and honors elite marketers from both brands and agencies for their excellence and successful results. The Tampa chapter of the American Marketing Association recognized the team for direct marketing, special events marketing, integrated marketing, and nonprofit marketing. They also received the 2016 Be More Informed: Nielson Marketing Campaign Award for the ‘Choose Hope’ marketing and community engagement campaign. The department is led by Justine Burke, Senior Director of Marketing and Communications. Justine has 30+ years of experience in corporate, agency, start-ups and nonprofit marketing. This department will be utilized to develop marketing tools and materials and maintain the website and social media communications.

Relationships:
MM has relationships with many community partners which will be an advantage in communicating and distributing information. MM currently has over 100 established partnerships with local organizations that serve vulnerable individuals, children, and families in Tampa Bay. Relationships include:
-Children’s Board of Hillsborough County
-Nonprofit Leadership Center of Tampa Bay
-School District of Hillsborough County
-Well Care
-Care Plus
-Molina Health Care
-Bay Care
-Early Childhood Council
-Early Learning Coalition
-Hillsborough Education Foundation

Pilot Program
Effinity began piloting its operation in August 2017, and has provided training to 10 different organizations in the state of Florida. Additionally, Director Jamie Meyer has given two national presentations: “The Why Behind The What” at the University of South Florida TedTalk Event and “Compassion Fatigue” at the New York Institute on Child Poverty and Homelessness Conference. Below is a summary of past training transactions:

<table>
<thead>
<tr>
<th>Date</th>
<th>Customer</th>
<th>Training</th>
<th>Length</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2017</td>
<td>CPI</td>
<td>Compassion Fatigue</td>
<td>2 hrs.</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Hillsborough County</td>
<td>Trauma Informed Care</td>
<td>8 hrs.</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Patricia J. Sullivan Partnership School</td>
<td>Trauma Informed Care</td>
<td>4 hrs.</td>
<td>$0</td>
</tr>
<tr>
<td>September 2017</td>
<td>Tampa Museum of Art</td>
<td>Art Sensitivity</td>
<td>1.5 hrs.</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Talbot House</td>
<td>De-Escalation</td>
<td>2 hrs.</td>
<td>$400</td>
</tr>
<tr>
<td>October 2017</td>
<td>Big Brother Little Sister</td>
<td>Ethics</td>
<td>4 hrs.</td>
<td>$200</td>
</tr>
<tr>
<td></td>
<td>Talbot House</td>
<td>Safety Plan</td>
<td>2 hrs.</td>
<td>$400</td>
</tr>
<tr>
<td>November 2017</td>
<td>Alliance to End Homelessness</td>
<td>First Hug Model</td>
<td>1.5 hrs.</td>
<td>$0</td>
</tr>
<tr>
<td>Month 2018</td>
<td>Provider</td>
<td>Training Title</td>
<td>Duration</td>
<td>Fee</td>
</tr>
<tr>
<td>-----------</td>
<td>----------</td>
<td>----------------</td>
<td>----------</td>
<td>-----</td>
</tr>
<tr>
<td>January 2018</td>
<td>Talbot House, Chapman Partnership</td>
<td>Organizational Change Consultation, Trauma Informed Care</td>
<td>1.5 hrs., 2 days</td>
<td>$400, $2000</td>
</tr>
<tr>
<td>February 2018</td>
<td>Talbot House, Chapman Partnership</td>
<td>Shift Manager Training, Compassion Fatigue</td>
<td>1.5 hrs., 1 hr.</td>
<td>$400, $400</td>
</tr>
<tr>
<td>March 2018</td>
<td>Talbot House, Hillsborough County School District Counselors</td>
<td>Compassion Fatigue</td>
<td>4 hrs.</td>
<td>$400</td>
</tr>
<tr>
<td>April 2018</td>
<td>Hillsborough County School District Social Workers</td>
<td>Intro. To Trauma Informed Care</td>
<td>3 hrs.</td>
<td>$400</td>
</tr>
<tr>
<td>May 2018</td>
<td>SEEDS Children’s Home Network</td>
<td>Trauma Tools, Trauma Informed Supervision</td>
<td>2.5 days, 3 hrs.</td>
<td>$2,500, $400</td>
</tr>
<tr>
<td>June 2018</td>
<td>Chapman Partnership, Talbot House</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>Customers: 10</td>
<td>Trainings: 17</td>
<td>Hrs. of Training 45.5</td>
<td>Revenue: $8,300</td>
</tr>
</tbody>
</table>

Evaluation surveys administered to participants after the trainings reveal that participants are very satisfied with the trainings delivered. Below is a table that highlights a selection from the evaluations received:

<table>
<thead>
<tr>
<th># of participants</th>
<th>Trainer Ratings (1-5, on average)</th>
<th>Content and Structure of Training Ratings (1-5, on average)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Knowledge of subject matter</td>
<td>Ability to explain &amp; illustrate concepts</td>
</tr>
<tr>
<td>1</td>
<td>4.9</td>
<td>4.7</td>
</tr>
<tr>
<td>2</td>
<td>4.8</td>
<td>4.9</td>
</tr>
<tr>
<td>3</td>
<td>4.9</td>
<td>4.9</td>
</tr>
<tr>
<td>4</td>
<td>4.9</td>
<td>4.9</td>
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<tr>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>5</td>
<td>4.9</td>
</tr>
<tr>
<td>7</td>
<td>4.9</td>
<td>4.9</td>
</tr>
</tbody>
</table>

Other qualitative results include the following comments:

- “Very effective, very necessary”
• “Engaging, great sense of humor, knowledgeable. This training will help me go back to my school and train my team members.”

• “Jamie Meyer is an engaging, knowledgeable, passionate presenter who brings her 20 years of experience in social services to offer a thoughtful and challenging message in any setting. From the board room to the class room, Jamie’s easygoing and flexible style instantly puts you at ease and her exercises and examples leave you eager for more. She has done the research, lived the principles, and shares her wisdom in an authentic and accessible way while modeling the impact it has had on her life. Her commitment to excellence in preparation and presentation make her a joy with which to work.”- Vicki Walker, Hyde Park United Methodist
Social Return on Investment
Effinity will provide a Social Return on Investment in four ways:

- Transferring best practices and knowledge to other organizations that will improve employee culture and service delivery.
- Creating a trauma informed Tampa Bay community.
- Providing unrestricted income to support Metropolitan Ministries’ trauma informed counseling and education services.
- Transforming lives of Metropolitan Ministries’ clients who are employed by Effinity in an administrative capacity.

-Transferring best practices and knowledge to other organizations
Metropolitan Ministries has become a leader in organizational culture in the Tampa Bay area as evidenced by an increase in successful outcomes for clients, increased retention for staff, and the prestigious designation as one of Tampa Bay’s Top Workplaces for 2013 to 2017.

Effinity will take the knowledge gained from our journey to becoming a trauma-informed organization and create transformative learning experiences to share with other organizations. The results will be more organizations practicing trauma informed care, which will lead to better retention of the organization’s staff and increased employee morale.

Increased employee morale and decreased staff turnover present a large return on investment. A study completed by the Society for Human Resources Management (SHRM) stated each time a business replaces a salaried employee it costs the organization 6 to 9 month of that employee's salary on average. To put that in perspective, an organization could lose $25,000 to $37,500 in recruiting and training expenses if it lost a manager who made $50,000 a year. For organizations with high turnover due to low morale and toxic stress, the loss of employees is even more magnified. Also, organizations with low morale and toxic stress spend time reacting to crises rather than planning for growth, increased efficiencies, or modifying practices based on research and trends. Over time, this impacts organizational sustainability.

-Creating a trauma informed Tampa Bay community
The vision of Effinity is to create a Trauma informed Tampa Bay community that prevents the most vulnerable from being re-traumatized on their journey to seeking assistance. This will result in increased well-being for those seeking services throughout a variety of social service sectors by providing a common language and seamless services.

People in crisis can easily be re-traumatized by their environment. For example, in the homeless continuum of care, a bad experience for a homeless family at an Outreach Center may cause an increase in the family’s stress, an increase in the amount of time the family remains living on the street or in their car, or even relapses in mental health or substance abuse issues. A good experience could result in being linked with preventing or diverting homelessness or getting into safe shelter with wrap around support services to address needs for the whole family. For the children in this situation, the longer a child remains homeless the more likely they are to feel the disparate impacts of homelessness, such as an increased likelihood of developing a mental health condition or dropping out of school.
Ultimately, trauma informed organizations result in better outcomes for clients in whatever capacity they are served. Since MM implemented trauma informed care, we've seen our success rate for families housed one year later after exiting from shelter increase to 94%. Creating a trauma informed community can increase results for those seeking services across Tampa Bay.

*Providing Unrestricted Income*
As Effinity moves towards solvency, the business will generate positive cash flow to support MM’s trauma-informed counseling and education programs.

*Transforming lives through employment*
Effinity will employ a former resident in an administrative capacity and may also have other job training opportunities through internships or other volunteer opportunities.
Financial Plan

Start Up Funds
Startup expenses for the pilot program, including training materials and equipment, space, and salary, have been contributed by Metropolitan Ministries. The investment in the first few months includes staffing and infrastructure costs including computer equipment, website development and other marketing materials. Additionally, we will invest in becoming certified with the National Council on Accreditation to provide continuing professional education credits in the first month of launch.

Metropolitan Ministries will leverage our existing staff resources to support the program. MM’s award winning marketing team will utilize experience from launching two other successful social enterprises to maximize resources to achieve the desired reach. MM’s reputation and position in the community allow us to utilize and leverage partnerships which provide in-kind marketing support or very discounted rates for services (1/3 of cost). Additionally, our network of media contacts allow us to leverage free advertising through hundreds of news stories a year, which we would use to raise awareness for Effinity. An AmeriCorps VISTA volunteer will provide additional capacity building support (1 FTE) at a very low cost to the Ministries ($4500 per year). Also, a 10% administrative/occupancy cost was included in the budget to cover items such as compliance, invoicing, and occupancy costs.

Breakeven Analysis
Effinity is targeted to reach its operational breakeven point in Year 5. This is the point at which the net income becomes positive. MM will commit to supporting Effinity through the point it becomes profitable. Year 1 will see a loss of approximately $49,000. Each year the loss projections decrease as Effinity increases reach and performs more trainings, with year 2 decreasing to $35,000. Years 3 and 4 will see small losses of approximately $14,000. Year 5 will see a profit of a little over $18,000.
**Business Goals and Objectives**

**Goal 1: Launch Effinity pilot program to perfect the concept and ramp up operations.**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Deadline</th>
<th>Responsible Party</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finalize training and coaching offerings</td>
<td>7/1/2018</td>
<td>Director</td>
<td>Done</td>
</tr>
<tr>
<td>Conduct 1 training per month</td>
<td>7/1/2018</td>
<td>Director</td>
<td>Done</td>
</tr>
<tr>
<td>Finalize brand</td>
<td>9/1/2018</td>
<td>MM Marketing Team</td>
<td>In progress</td>
</tr>
<tr>
<td>Set up phone line and email address</td>
<td>9/1/2018</td>
<td>MM IT Team</td>
<td>In progress</td>
</tr>
<tr>
<td>Reformat training materials to match new branding layout</td>
<td>10/1/2018</td>
<td>MM Marketing Team</td>
<td>In progress</td>
</tr>
<tr>
<td>(handouts, slides, evaluations, PowerPoints)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare facility for onsite trainings</td>
<td>10/1/2018</td>
<td>Director</td>
<td>In progress</td>
</tr>
<tr>
<td>Design new promotional brochure and launch Effinity’s website</td>
<td>1/1/2019</td>
<td>MM Marketing Team</td>
<td>In progress</td>
</tr>
<tr>
<td>Recruit and train Training and Service Coordinator VISTA</td>
<td>1/1/2019</td>
<td>Director, HR Team</td>
<td>In progress</td>
</tr>
<tr>
<td>Launch Social Media Accounts</td>
<td>1/1/19-3/1/19</td>
<td>MM Marketing Team</td>
<td>TBD</td>
</tr>
<tr>
<td>Launch Digital Ad Campaign</td>
<td>3/1/2019</td>
<td>MM Marketing Team</td>
<td>TBD</td>
</tr>
<tr>
<td>Effinity will pursue Continuing Education and Training Accreditation</td>
<td>10/1/2019</td>
<td>Director</td>
<td>TBD</td>
</tr>
</tbody>
</table>

**Goal 2: Reach Year 1 sales and target to ultimately generate positive cash flow to support other Ministries programs.**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Deadline</th>
<th>Responsible Party</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market to identified health care, elder care, child care, and other</td>
<td>11/30/2018</td>
<td>Director, Training and Service Coordinator VISTA, MM</td>
<td>TBD</td>
</tr>
<tr>
<td>organizations</td>
<td></td>
<td>Marketing Dept.</td>
<td></td>
</tr>
<tr>
<td>Market to MM corporate donors and word of mouth</td>
<td>11/30/2018</td>
<td>Director, Training and Service Coordinator VISTA, MM</td>
<td>TBD</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Marketing Dept.</td>
<td></td>
</tr>
<tr>
<td>Conduct 50 total trainings</td>
<td>6/30/2019</td>
<td>Effinity Staff</td>
<td>In progress</td>
</tr>
</tbody>
</table>
Goal 3: Create employment opportunities that offer residents of MM’s Uplift-U Self-Sufficiency program on the job training and valuable, real-world work experience.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Deadline</th>
<th>Responsible Party</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build out position(s) along with necessary training to be filled by MM clients</td>
<td>3/30/2019</td>
<td>Training and Service Coordinator VISTA,</td>
<td>TBD</td>
</tr>
<tr>
<td>Recruit, hire, and train 1 part-time Sales and Customer Service Associate who is a graduate of MM’s Self-Sufficiency program</td>
<td>7/1/2019</td>
<td>Director, MM IHR Team</td>
<td>TBD</td>
</tr>
<tr>
<td>Recruit, hire, and train 1 full time Sales and Customer Service Associate who is a graduate of MM’s Self-Sufficiency program</td>
<td>7/1/2020</td>
<td>Director, MM HR Team</td>
<td>TBD</td>
</tr>
</tbody>
</table>
### Exhibit A: Profit and Loss Projections

#### Year 1 Profit and Loss by Month

<table>
<thead>
<tr>
<th>Category</th>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
<th>Month 5</th>
<th>Month 6</th>
<th>Month 7</th>
<th>Month 8</th>
<th>Month 9</th>
<th>Month 10</th>
<th>Month 11</th>
<th>Month 12</th>
<th>Total Year 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trainings (units)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue (per unit)</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
</tr>
<tr>
<td>Travel Reimbursement</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$750</td>
<td>$750</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$1,000</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>$4,100</td>
<td>$4,100</td>
<td>$4,100</td>
<td>$4,100</td>
<td>$4,100</td>
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<td>$8,200</td>
<td>$8,200</td>
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<tr>
<td><strong>Variable Expenses</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contracted Trainers</td>
<td>$300</td>
<td>$300</td>
<td>$300</td>
<td>$400</td>
<td>$400</td>
<td>$500</td>
<td>$500</td>
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<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$5,100</td>
</tr>
<tr>
<td>Travel</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$750</td>
<td>$750</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$8,500</td>
</tr>
<tr>
<td>Digital Ad</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$500</td>
<td>$3,000</td>
</tr>
<tr>
<td>Marketing Materials</td>
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<td>$184</td>
<td>$184</td>
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<td>$184</td>
<td>$184</td>
<td>$184</td>
<td>$184</td>
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<td>Training Materials</td>
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<td>$83</td>
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<tr>
<td>Equipment</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Contracted Services</td>
<td>$5,555</td>
<td>$20</td>
<td>$20</td>
<td>$20</td>
<td>$20</td>
<td>$20</td>
<td>$20</td>
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<td>$20</td>
<td>$20</td>
<td>$20</td>
<td>$20</td>
<td>$5,575</td>
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<tr>
<td><strong>TOTAL Variable Expenses</strong></td>
<td>$7,522</td>
<td>$1,087</td>
<td>$1,087</td>
<td>$1,187</td>
<td>$1,187</td>
<td>$1,937</td>
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<td>$2,287</td>
<td>$2,287</td>
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<tr>
<td><strong>Fixed Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior Director Clinical Services</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$668</td>
<td>$8,017</td>
</tr>
<tr>
<td>Director Digital Strategy</td>
<td>$472</td>
<td>$472</td>
<td>$472</td>
<td>$472</td>
<td>$472</td>
<td>$472</td>
<td>$472</td>
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<td>$472</td>
<td>$472</td>
<td>$472</td>
<td>$472</td>
<td>$5,665</td>
</tr>
<tr>
<td>Senior Director of Marketing</td>
<td>$393</td>
<td>$393</td>
<td>$393</td>
<td>$393</td>
<td>$393</td>
<td>$393</td>
<td>$393</td>
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<td>$393</td>
<td>$393</td>
<td>$393</td>
<td>$393</td>
<td>$4,712</td>
</tr>
<tr>
<td>Benefits</td>
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<td>$1,478</td>
<td>$1,478</td>
<td>$1,478</td>
<td>$17,736</td>
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<tr>
<td>AmeriCorps VISTA</td>
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<td>$375</td>
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<td>$375</td>
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<td>$375</td>
<td>$375</td>
<td>$375</td>
<td>$375</td>
<td>$4,500</td>
</tr>
<tr>
<td><strong>Total Fixed Expenses</strong></td>
<td>$6,689</td>
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<td>$6,689</td>
<td>$6,689</td>
<td>$6,689</td>
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<td>$6,689</td>
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<td>$6,689</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>$14,211</td>
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<td>$8,976</td>
<td>$8,976</td>
<td>$8,976</td>
<td>$106,749</td>
</tr>
<tr>
<td><strong>Net Profit</strong></td>
<td>$(10,111)</td>
<td>$(3,675)</td>
<td>$(3,675)</td>
<td>$(3,776)</td>
<td>$(3,776)</td>
<td>$(3,176)</td>
<td>$(3,176)</td>
<td>$(776)</td>
<td>$(776)</td>
<td>$(776)</td>
<td>$(776)</td>
<td>$(776)</td>
<td>$(38,249)</td>
</tr>
</tbody>
</table>
Exhibit A: Profit and Loss Projections

5 Year Profit and Loss

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trainings (units)</strong></td>
<td>50</td>
<td>100</td>
<td>120</td>
<td>120</td>
<td>150</td>
</tr>
<tr>
<td>Revenue (per unit)</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
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<td>Contracted Trainers</td>
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Exhibit B: Sample Training Syllabus

Training Syllabus: Chapman Partnership

TRAINER: JAMIE MEYER
jamie.meyer@metromin.org

Course Overview: Session One - Intro to Trauma Informed Care
4 hour training at each site during two consecutive days
The intro to trauma informed care (TIC) will be an interactive workshop focused on the basics of trauma theory and the impacts of trauma on the brain. Staff will learn about the ACES (Adverse Childhood Experiences Study) and how ACES impact both the clients they serve as well as themselves as professionals.

Learning Objectives
- Participants will gain an understanding of trauma and the approach of trauma informed care
- Participants will learn about emotional intelligence in the clients served and themselves
- Participants will learn about the ACES (Adverse Childhood Experience Study) and examine their own ACES and how it impacts their work
- Participants will learn to reframe client behavior and attitudes with a trauma informed lens

Suggested Readings and Videos
1. van der Kolk. The Body Keeps Score: Brain, mind and body in the healing of trauma. 2015.
3. Nadine Burke Harris, MD Ted Talk https://www.ted.com/talks/nadine_burke_harris_how_childhood_trauma_affects_health_across_a_lifet ime

Course Overview: Session Two - Skills and Tools for Working with Trauma
4 hour training at each site during two consecutive days
This session will build upon the knowledge base in session one and will move staff into hands-on tools and applications of their understanding of trauma. Individually and in small groups, staff will develop and practice hands on tools to implement with the clients they serve.

Learning Objectives
- Participants will learn about and practice trauma informed techniques for staff meetings and client meetings
- Participants will learn about tools to use when working through crisis situations with clients

2002 North Florida Ave. Tampa, FL 33602 | 3214 US Highway 19 North Holiday, FL 34691 | metromin.org
- Participants will practice with each other the tools they will use as co-workers and in work with clients and receive feedback from the group
- Participants will learn specific mindfulness techniques for children and adults which integrate with a trauma informed approach

**Suggested Readings and Videos**

3. Paper Tigers Documentary. [https://www.youtube.com/watch?v=KdDr_nZO1Xc](https://www.youtube.com/watch?v=KdDr_nZO1Xc)

**Course Overview: Session Three - Trauma Informed De-escalation**

*4 hour training at each site during two consecutive days*

Building on sessions one and two, this session will focus specifically on two major goals: avoiding an escalated incident and verbally de-escalating a situation with clients.

**Learning Objectives**

- Participants will learn techniques such as the LEAP technique (Dr. Xavier Amador, LEAP institute) to build relationship and avoid escalation
- Participants will learn about active listening and techniques to gain agreement
- Participants will gain knowledge and skill in recognizing when a situation needs to be de-escalating and using a trauma informed approach in de-escalating
- Participants will learn to use their knowledge base in trauma informed care to develop and maintain relationships and have positive outcomes with even the most difficult clients and situations

**Suggested Readings and Videos**

1. Amador. Learn to LEAP DVD Series.

**Course Overview: Session Four – Compassion Fatigue**

*4 hour training at each site during two consecutive days*

This session on compassion fatigue will be an interactive workshop focused on the basics of vicarious trauma, burnout and compassion fatigue and the impact compassion fatigue has on the individuals we serve. We will focus on skills and tools that helping professionals need to prioritize in order to be effective in their service.

**Learning Objectives**

- Participants will gain an understanding of compassion fatigue, vicarious trauma and burnout
- Participants will be able to identify their own personal red flag signs of compassion fatigue
- Participants will gain skills and tools to use in the workplace to avoid compassion fatigue
• Participants will develop a specific self-care plan they can use as they return to the workplace
• Participants will develop an accountability plan for themselves and for the staff they supervise to implement and maintain self-care

Suggested Readings and Videos

1. Lipsky and Burke. Trauma Stewardship: an everyday guide to caring for self while caring for others. 2009
3. Mathieu. The Compassion Fatigue Workbook. 2014
4. Laura van Dernoot Lipsky Tedx Talk [https://www.youtube.com/watch?v=UzDGrvymus](https://www.youtube.com/watch?v=UzDGrvymus)
August 2, 2018

Children's Board of Hillsborough County
1002 East Palm Avenue
Tampa, Florida 33605

To Whom It May Concern:

We have partnered with Metropolitan Ministries to deliver training to all of our staff, our leadership team and other staff subgroups. I can attest to the professionalism and effectiveness of that training. Specifically, we have received training in different aspects of trauma-informed care and communication, with positive results. Staff members have provided instant feedback, offering that the Metropolitan Ministries training is the best training they have had.

What makes Metropolitan Ministries superior in their training? It is interactive, interesting, and research based. Their knowledge of human resource issues also gives them an edge, as they are able to quickly identify potential personnel “hotspots” and address in a non-threatening way. On a personal level, I have found their advice invaluable in working with my staff.

I strongly support their application for funding. If you have any questions, please do not hesitate to contact me.

Kind regards,

Brenda C. Reddout, PhD
Executive Director
Exhibit E: Efinity Organizational Chart

Director-Jamie Meyer

Sales and Customer Service Associate- MM Client Graduate (begining Year 2)

AmeriCorps Vista- Training and Service Coordinator

Faculty Trainer- Beth Orr

Faculty Trainer- Janelle Stewart

Faculty Trainer
EXECUTIVE COMMITTEE
Thomas P. Cornett, Chair
Tricia Hancock, Past Chair
Chris Christenherry, Secretary
Andrew (Drew) Pittman, V. P. Finance & Audit
Bryce R. Kenny, V. C. Advancement
Carlos Baldor, Jr., V. C. Programs
Andy May, V. C. Facilities
Molly James, V. C. Strategic Planning
Jeff Marple, V. C. Social Enterprise
CEO
Preston Farrior, MM Foundation Liaison

DIRECTORS
Rick Alvarez
Robert D. Basham
David Behears
Chas Bruck
Karen Buesing
Reverend Evan Burrows
Andrea Cheney
Chad Chronister
Gerard Coughlin
Frank Ferreri
Scott Fink
Josh Helms
Rose Hester
Kurt H. Hull
Reverend Greg Johnson
Linda Mills, LAMPlightner
David L. Redmond
Jerome Ryans
Martin Silbiger, M.D.
Bruce Tigert
Will Weatherford

Exhibit F: 2018 - 2019 Board of Directors
Metropolitan Ministries

Executive Staff - Metropolitan Ministries
Tim Marks, President / Chief Executive Officer
Morris E. Hintzman, President Foundation
Amy Kern, Chief Financial Officer
Christine Long, Chief Program Officer
Linda Shaw, Executive Assistant
2002 N. Florida Ave. - 33602
813-209-1250 (Tim) FAX: 813-209-1223
813-209-1011 (Morris) FAX: 813-209-1223
813-209-1021 (Amy) FAX: 813-209-1223
813-209-1029 (Christine) FAX: 813-209-1223
813-209-1004 (Linda) FAX: 813-209-1223
Email: Morris.hintzman@metromin.org
Email: Tim.marks@metromin.org
Email: Amy.kern@metromin.org
Email: Christine.long@metromin.org
Email: Linda.shaw@metromin.org
Exhibit F: Social Enterprise Committee
Metropolitan Ministries

**Social Enterprise**

**Jeff Marple, Vice Chair**
CEO
Key West Lighting & Design

Thomas P. Cornett
Regions Financial (Sr. Managing Director)

Rick Alvarez
Older Lundry & Alvarez

Robert Basham
Founder – Outback Steakhouse
MVP Holdings

Chas Bruck
Soho Capital

Andrea Cheney
Strategic Marketing Planning

Chris Christenberry
President & CEO
Atlantic Health Solutions

Frank Ferrarri
Ferrari Search

Bruce Tigert
Bayshore Title

**Social Enterprise Adhoc**

Andy Hafer

Dave Magrisso

Dhvanit Patel

Eric Bailey

Mike Mezrah

Anddrikk Frazier

Dez Williams

Kelly Breeding

Jeff Gigante

Ali Marpet

Bryan Van Vranken