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Frank Edelblut
Commissioner

Christine Brennan
Deputy Commissioner

STATE OF NEW HAMPSHIRE
DEPARTMENT OF EDUCATION
101 Pleasant Street
Concord, N.H. 03301
TEL. (603) 271-3495
FAX (603) 271-1953

January 25, 2022

His Excellency, Governor Christopher T. Sununu
and the Honorable Executive Council
State House
Concord, New Hampshire 03301

REQUESTED ACTION

Authorize the Department of Education, Bureau of Vocational Rehabilitation (VR) to enter into a contract with FUTURE IN SIGHT (FIS), of Concord, NH (Vendor Code 154156), in an amount not to exceed \$81,148, to provide Independent Living (IL), Part B services, effective upon Governor and Council approval through September 30, 2023. 4.5% Federal Funds and 95.5% General Funds.

Funds to support this request are available in the account titled Independent SVCS PT B-Federal and Independent SVCS PT B-State in FY2022 and FY2023, and anticipated to be available in FY2024, upon the availability and continued appropriation of funds in the future operating budget, with the ability to adjust encumbrances between State Fiscal years through the Budget Office, without further Governor and Council approval, if needed and justified.

	<u>FY2022</u>	<u>FY2023</u>	<u>FY2024</u>
06-56-56-565010-25420000-102-500731	\$1,369.90	\$1,827.20	\$457.30
Contracts for Program Services			
06-56-56-565010-30060000-601-500931	<u>\$29,060.10</u>	<u>\$38,746.80</u>	<u>\$9,686.70</u>
State Fund Match			
Total	\$30,430.00	\$40,574.00	\$10,144.00

EXPLANATION

The New Hampshire Department of Education receives an annual grant of \$338,117 from the United States Department of Health and Human Services, Administration of Community Living, and Independent Living Administration. The grant under Title VI, Part B of the Rehabilitation Act, as amended, enables the state to provide independent living services to individuals with significant disabilities so they can become more independent in their homes and communities. The Department provides services through contracts with nonprofit organizations which are directed and managed primarily by persons with significant disabilities. The services provide under the contract are available statewide. Services include: information and referral, peer advocacy,

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accessible van transportation, care coordination, vehicle modification program and independent living skills training.

FUTURE IN SIGHT has a governing board that is controlled by persons with disabilities. They provide critical independent living services to individuals who are blind and vision-impaired. The purpose of FUTURE IN SIGHT is to transform the lives of infants and children, adults and seniors who are blind and visually impaired through education, training and support. Services to be provided by FUTURE IN SIGHT include: information and referral services, independent living skills training, low vision training, rehabilitation therapy, orientation and mobility, assistive technology training, training on aids and devices, peer support, transportation, individual advocacy, systems advocacy and the telecommunications equipment assistance program.

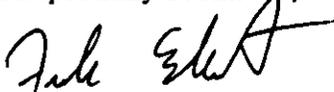
A Request for Proposals (RFP) was advertised on the Department of Education website on 3/8/21 with a deadline for proposals of 4/26/21. There were five (5) proposals submitted to the Request for Proposals "Independent Living, Part B" in response to the notice.

A review committee consisting of the Administrator for Blind Services, a Program Specialist, Field Service Administrator and a VR Supervisor met to review the proposals. The team reviewed the five (5) proposals received by the deadline (Attachment A). Base on the review, the team recommended funding all 5 proposals. Each contract will be submitted to the Governor and Council as it is completed.

The outcome VR would like to achieve with this contract is to have independent living services provided statewide so more individuals with significant disabilities can maintain residence in their chosen locations within their communities.

If Federal Funds should become unavailable, General Funds will not be requested to support this program.

Respectfully Submitted,



Frank Edelblut
Commissioner of Education

B & F TEACHING AND TECHNOLOGY, LLC

Attachment A

Scoring for the Independent Living, Part B proposals:

Significance of Proposal: Description of applicant's abilities to meet or exceed the Purposes and Priorities, Minimum Requirements and Services to be Provided, including a description of work experience and educational background in Independent Living service provision. This will include a review of the letter of interest, letters of recommendation and resumes.

<u>Proposal Criteria</u>	<u>Reviewers Average Score</u>
Statement of Need (10)	5
Project Description (20)	10
Sustainability (20)	20
Organizational Capacity (15)	25
Collaboration (15)	19
Organization Budget (20)	<u>18.75</u>
Total for Evaluation Criteria	97.75

Evaluation Criteria Scores (proposals above 60 will receive funding if appropriate)

	Dan F.	Lisa B.	Scott V.	Beth D.	Total for Evaluation Criteria
B & F	100	96	98	97	97.75
FIS	89	91	89	95	91
BIANH	87	83	92	93	88.75
NDHHS	85	85	85	89	86
GSIL	70	73	80	76	74.75

BIANH=Brain Injury Association of New Hampshire, GSIL=Granite State Independent Living, NDHHS=Northeast Deaf and Hard of Hearing Services, FIS=Future In Sight, B & F= B & F Teaching and Technology

Scoring for review occurred on May 5, 2021. The proposal review panel consisted of the following employees from the Department of Education:

Reviewer Qualifications:

Dan F. has worked for the VR agency for 2 years and is the Administrator for Blind and Vision-Impaired.

Lisa B. has worked for the agency for six years and is a VR Supervisor. She has oversight of a local office and assists in other activities as needed within the administration.

Scott V. has worked for the VR agency for over 20 years and has primary responsibility over blind services operations.

Beth D. has worked for the agency for 29 years and oversees the agencies VR offices and supervisors for the bureau.

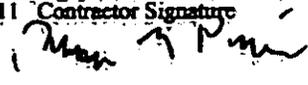
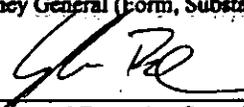
Notice: This agreement and all of its attachments shall become public upon submission to Governor and Executive Council for approval. Any information that is private, confidential or proprietary must be clearly identified to the agency and agreed to in writing prior to signing the contract.

AGREEMENT

The State of New Hampshire and the Contractor hereby mutually agree as follows:

GENERAL PROVISIONS

1. IDENTIFICATION.

1.1 State Agency Name Department of Education		1.2 State Agency Address 21 S. Fruit Street, Suite 20 Concord, NH 03301	
1.3 Contractor Name FUTURE IN SIGHT		1.4 Contractor Address 25 Walker Street Concord, NH 03301	
1.5 Contractor Phone Number 603-565-2411	1.6 Account Number See Exhibit C	1.7 Completion Date 9/30/2023	1.8 Price Limitation \$81,148
1.9 Contracting Officer for State Agency Lisa Hinson-Hatz, VR Director		1.10 State Agency Telephone Number 603-419-0086	
1.11 Contractor Signature  Date: 1/11/22		1.12 Name and Title of Contractor Signatory Randy Pierce, President & Chief Executive Officer	
1.13 State Agency Signature  Date: 1/27/2022		1.14 Name and Title of State Agency Signatory Frank Edelbuh, Commissioner	
1.15 Approval by the N.H. Department of Administration, Division of Personnel (if applicable) By: _____ Director, On: _____			
1.16 Approval by the Attorney General (Form, Substance and Execution) (if applicable) By: Christopher Bond  On: 1/28/2022			
1.17 Approval by the Governor and Executive Council (if applicable) G&C Item number: _____ G&C Meeting Date: _____			

Contractor Initials 
 Date 1/11/22

2. SERVICES TO BE PERFORMED. The State of New Hampshire, acting through the agency identified in block 1.1 ("State"), engages contractor identified in block 1.3 ("Contractor") to perform, and the Contractor shall perform, the work or sale of goods, or both, identified and more particularly described in the attached EXHIBIT B which is incorporated herein by reference ("Services").

3. EFFECTIVE DATE/COMPLETION OF SERVICES.

3.1 Notwithstanding any provision of this Agreement to the contrary, and subject to the approval of the Governor and Executive Council of the State of New Hampshire, if applicable, this Agreement, and all obligations of the parties hereunder, shall become effective on the date the Governor and Executive Council approve this Agreement as indicated in block 1.17, unless no such approval is required, in which case the Agreement shall become effective on the date the Agreement is signed by the State Agency as shown in block 1.13 ("Effective Date").

3.2 If the Contractor commences the Services prior to the Effective Date, all Services performed by the Contractor prior to the Effective Date shall be performed at the sole risk of the Contractor, and in the event that this Agreement does not become effective, the State shall have no liability to the Contractor, including without limitation, any obligation to pay the Contractor for any costs incurred or Services performed. Contractor must complete all Services by the Completion Date specified in block 1.7.

4. CONDITIONAL NATURE OF AGREEMENT.

Notwithstanding any provision of this Agreement to the contrary, all obligations of the State hereunder, including, without limitation, the continuance of payments hereunder, are contingent upon the availability and continued appropriation of funds affected by any state or federal legislative or executive action that reduces, eliminates or otherwise modifies the appropriation or availability of funding for this Agreement and the Scope for Services provided in EXHIBIT B, in whole or in part. In no event shall the State be liable for any payments hereunder in excess of such available appropriated funds. In the event of a reduction or termination of appropriated funds, the State shall have the right to withhold payment until such funds become available, if ever, and shall have the right to reduce or terminate the Services under this Agreement immediately upon giving the Contractor notice of such reduction or termination. The State shall not be required to transfer funds from any other account or source to the Account identified in block 1.6 in the event funds in that Account are reduced or unavailable.

5. CONTRACT PRICE/PRICE LIMITATION/PAYMENT.

5.1 The contract price, method of payment, and terms of payment are identified and more particularly described in EXHIBIT C which is incorporated herein by reference.

5.2 The payment by the State of the contract price shall be the only and the complete reimbursement to the Contractor for all expenses, of whatever nature incurred by the Contractor in the performance hereof, and shall be the only and the complete

compensation to the Contractor for the Services. The State shall have no liability to the Contractor other than the contract price.

5.3 The State reserves the right to offset from any amounts otherwise payable to the Contractor under this Agreement those liquidated amounts required or permitted by N.H. RSA 80:7 through RSA 80:7-c or any other provision of law.

5.4 Notwithstanding any provision in this Agreement to the contrary, and notwithstanding unexpected circumstances, in no event shall the total of all payments authorized, or actually made hereunder, exceed the Price Limitation set forth in block 1.8.

6. COMPLIANCE BY CONTRACTOR WITH LAWS AND REGULATIONS/ EQUAL EMPLOYMENT OPPORTUNITY.

6.1 In connection with the performance of the Services, the Contractor shall comply with all applicable statutes, laws, regulations, and orders of federal, state, county or municipal authorities which impose any obligation or duty upon the Contractor, including, but not limited to, civil rights and equal employment opportunity laws. In addition, if this Agreement is funded in any part by monies of the United States, the Contractor shall comply with all federal executive orders, rules, regulations and statutes, and with any rules, regulations and guidelines as the State or the United States issue to implement these regulations. The Contractor shall also comply with all applicable intellectual property laws.

6.2 During the term of this Agreement, the Contractor shall not discriminate against employees or applicants for employment because of race, color, religion, creed, age, sex, handicap, sexual orientation, or national origin and will take affirmative action to prevent such discrimination.

6.3 The Contractor agrees to permit the State or United States access to any of the Contractor's books, records and accounts for the purpose of ascertaining compliance with all rules, regulations and orders, and the covenants, terms and conditions of this Agreement.

7. PERSONNEL.

7.1 The Contractor shall at its own expense provide all personnel necessary to perform the Services. The Contractor warrants that all personnel engaged in the Services shall be qualified to perform the Services, and shall be properly licensed and otherwise authorized to do so under all applicable laws.

7.2 Unless otherwise authorized in writing, during the term of this Agreement, and for a period of six (6) months after the Completion Date in block 1.7, the Contractor shall not hire, and shall not permit any subcontractor or other person, firm or corporation with whom it is engaged in a combined effort to perform the Services to hire, any person who is a State employee or official, who is materially involved in the procurement, administration or performance of this Agreement. This provision shall survive termination of this Agreement.

7.3 The Contracting Officer specified in block 1.9, or his or her successor, shall be the State's representative. In the event of any dispute concerning the interpretation of this Agreement, the Contracting Officer's decision shall be final for the State.

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8. EVENT OF DEFAULT/REMEDIES.

8.1 Any one or more of the following acts or omissions of the Contractor shall constitute an event of default hereunder ("Event of Default"):

8.1.1 failure to perform the Services satisfactorily or on schedule;

8.1.2 failure to submit any report required hereunder; and/or

8.1.3 failure to perform any other covenant, term or condition of this Agreement.

8.2 Upon the occurrence of any Event of Default, the State may take any one, or more, or all, of the following actions:

8.2.1 give the Contractor a written notice specifying the Event of Default and requiring it to be remedied within, in the absence of a greater or lesser specification of time, thirty (30) days from the date of the notice; and if the Event of Default is not timely cured, terminate this Agreement, effective two (2) days after giving the Contractor notice of termination;

8.2.2 give the Contractor a written notice specifying the Event of Default and suspending all payments to be made under this Agreement and ordering that the portion of the contract price which would otherwise accrue to the Contractor during the period from the date of such notice until such time as the State determines that the Contractor has cured the Event of Default shall never be paid to the Contractor;

8.2.3 give the Contractor a written notice specifying the Event of Default and set off against any other obligations the State may owe to the Contractor any damages the State suffers by reason of any Event of Default; and/or

8.2.4 give the Contractor a written notice specifying the Event of Default, treat the Agreement as breached, terminate the Agreement and pursue any of its remedies at law or in equity, or both.

8.3. No failure by the State to enforce any provisions hereof after any Event of Default shall be deemed a waiver of its rights with regard to that Event of Default, or any subsequent Event of Default. No express failure to enforce any Event of Default shall be deemed a waiver of the right of the State to enforce each and all of the provisions hereof upon any further or other Event of Default on the part of the Contractor.

9. TERMINATION.

9.1 Notwithstanding paragraph 8, the State may, at its sole discretion, terminate the Agreement for any reason, in whole or in part, by thirty (30) days written notice to the Contractor that the State is exercising its option to terminate the Agreement.

9.2 In the event of an early termination of this Agreement for any reason other than the completion of the Services, the Contractor shall, at the State's discretion, deliver to the Contracting Officer, not later than fifteen (15) days after the date of termination, a report ("Termination Report") describing in detail all Services performed, and the contract price earned, to and including the date of termination. The form, subject matter, content, and number of copies of the Termination Report shall be identical to those of any Final Report described in the attached EXHIBIT B. In addition, at the State's discretion, the Contractor shall, within 15 days of notice of early termination, develop and

submit to the State a Transition Plan for services under the Agreement.

10. DATA/ACCESS/CONFIDENTIALITY/PRESERVATION.

10.1 As used in this Agreement, the word "data" shall mean all information and things developed or obtained during the performance of, or acquired or developed by reason of, this Agreement, including, but not limited to, all studies, reports, files, formulae, surveys, maps, charts, sound recordings, video recordings, pictorial reproductions, drawings, analyses, graphic representations, computer programs, computer printouts, notes, letters, memoranda, papers, and documents, all whether finished or unfinished.

10.2 All data and any property which has been received from the State or purchased with funds provided for that purpose under this Agreement, shall be the property of the State, and shall be returned to the State upon demand or upon termination of this Agreement for any reason.

10.3 Confidentiality of data shall be governed by N.H. RSA chapter 91-A or other existing law. Disclosure of data requires prior written approval of the State.

11. CONTRACTOR'S RELATION TO THE STATE. In the performance of this Agreement the Contractor is in all respects an independent contractor, and is neither an agent nor an employee of the State. Neither the Contractor nor any of its officers, employees, agents or members shall have authority to bind the State or receive any benefits, workers' compensation or other emoluments provided by the State to its employees.

12. ASSIGNMENT/DELEGATION/SUBCONTRACTS.

12.1 The Contractor shall not assign, or otherwise transfer any interest in this Agreement without the prior written notice, which shall be provided to the State at least fifteen (15) days prior to the assignment, and a written consent of the State. For purposes of this paragraph, a Change of Control shall constitute assignment. "Change of Control" means (a) merger, consolidation, or a transaction or series of related transactions in which a third party, together with its affiliates, becomes the direct or indirect owner of fifty percent (50%) or more of the voting shares or similar equity interests, or combined voting power of the Contractor, or (b) the sale of all or substantially all of the assets of the Contractor.

12.2 None of the Services shall be subcontracted by the Contractor without prior written notice and consent of the State. The State is entitled to copies of all subcontracts and assignment agreements and shall not be bound by any provisions contained in a subcontract or an assignment agreement to which it is not a party.

13. INDEMNIFICATION. Unless otherwise exempted by law, the Contractor shall indemnify and hold harmless the State, its officers and employees, from and against any and all claims, liabilities and costs for any personal injury or property damages, patent or copyright infringement, or other claims asserted against the State, its officers or employees, which arise out of (or which may be claimed to arise out of) the acts or omission of the

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Contractor, or subcontractors, including but not limited to the negligence, reckless or intentional conduct. The State shall not be liable for any costs incurred by the Contractor arising under this paragraph 13. Notwithstanding the foregoing, nothing herein contained shall be deemed to constitute a waiver of the sovereign immunity of the State, which immunity is hereby reserved to the State. This covenant in paragraph 13 shall survive the termination of this Agreement.

14. INSURANCE.

14.1 The Contractor shall, at its sole expense, obtain and continuously maintain in force, and shall require any subcontractor or assignee to obtain and maintain in force, the following insurance:

14.1.1 commercial general liability insurance against all claims of bodily injury, death or property damage, in amounts of not less than \$1,000,000 per occurrence and \$2,000,000 aggregate or excess; and

14.1.2 special cause of loss coverage form covering all property subject to subparagraph 10.2 herein, in an amount not less than 80% of the whole replacement value of the property.

14.2 The policies described in subparagraph 14.1 herein shall be on policy forms and endorsements approved for use in the State of New Hampshire by the N.H. Department of Insurance, and issued by insurers licensed in the State of New Hampshire.

14.3 The Contractor shall furnish to the Contracting Officer identified in block 1.9, or his or her successor, a certificate(s) of insurance for all insurance required under this Agreement. Contractor shall also furnish to the Contracting Officer identified in block 1.9, or his or her successor, certificate(s) of insurance for all renewal(s) of insurance required under this Agreement no later than ten (10) days prior to the expiration date of each insurance policy. The certificate(s) of insurance and any renewals thereof shall be attached and are incorporated herein by reference.

15. WORKERS' COMPENSATION.

15.1 By signing this agreement, the Contractor agrees, certifies and warrants that the Contractor is in compliance with or exempt from, the requirements of N.H. RSA chapter 281-A ("*Workers' Compensation*").

15.2 To the extent the Contractor is subject to the requirements of N.H. RSA chapter 281-A, Contractor shall maintain, and require any subcontractor or assignee to secure and maintain, payment of Workers' Compensation in connection with activities which the person proposes to undertake pursuant to this Agreement. The Contractor shall furnish the Contracting Officer identified in block 1.9, or his or her successor, proof of Workers' Compensation in the manner described in N.H. RSA chapter 281-A and any applicable renewal(s) thereof, which shall be attached and are incorporated herein by reference. The State shall not be responsible for payment of any Workers' Compensation premiums or for any other claim or benefit for Contractor, or any subcontractor or employee of Contractor, which might arise under applicable State of New Hampshire Workers' Compensation laws in connection with the performance of the Services under this Agreement.

16. NOTICE. Any notice by a party hereto to the other party shall be deemed to have been duly delivered or given at the time of mailing by certified mail, postage prepaid, in a United States Post Office addressed to the parties at the addresses given in blocks 1.2 and 1.4, herein.

17. AMENDMENT. This Agreement may be amended, waived or discharged only by an instrument in writing signed by the parties hereto and only after approval of such amendment, waiver or discharge by the Governor and Executive Council of the State of New Hampshire unless no such approval is required under the circumstances pursuant to State law, rule or policy.

18. CHOICE OF LAW AND FORUM. This Agreement shall be governed, interpreted and construed in accordance with the laws of the State of New Hampshire, and is binding upon and inures to the benefit of the parties and their respective successors and assigns. The wording used in this Agreement is the wording chosen by the parties to express their mutual intent, and no rule of construction shall be applied against or in favor of any party. Any actions arising out of this Agreement shall be brought and maintained in New Hampshire Superior Court which shall have exclusive jurisdiction thereof.

19. CONFLICTING TERMS. In the event of a conflict between the terms of this P-37 form (as modified in EXHIBIT A) and/or attachments and amendment thereof, the terms of the P-37 (as modified in EXHIBIT A) shall control.

20. THIRD PARTIES. The parties hereto do not intend to benefit any third parties and this Agreement shall not be construed to confer any such benefit.

21. HEADINGS. The headings throughout the Agreement are for reference purposes only, and the words contained therein shall in no way be held to explain, modify, amplify or aid in the interpretation, construction or meaning of the provisions of this Agreement.

22. SPECIAL PROVISIONS. Additional or modifying provisions set forth in the attached EXHIBIT A are incorporated herein by reference.

23. SEVERABILITY. In the event any of the provisions of this Agreement are held by a court of competent jurisdiction to be contrary to any state or federal law, the remaining provisions of this Agreement will remain in full force and effect.

24. ENTIRE AGREEMENT. This Agreement, which may be executed in a number of counterparts, each of which shall be deemed an original, constitutes the entire agreement and understanding between the parties, and supersedes all prior agreements and understandings with respect to the subject matter hereof.

EXHIBIT A

Additional Exhibits D-G.

Federal Certification 2 CFR 200.415

Required certifications include: (a) To assure that expenditures are proper and in accordance with the terms and conditions of the Federal award and approved project budgets, the annual and final fiscal reports or vouchers requesting payment under the agreements must include a certification, signed by an official who is authorized to legally bind the non-Federal entity, which reads as follows:

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).

All the terms and conditions applicable for the use of Federal funds, as outlined in the Office of Management and Budget (OMB) Uniform Grant Guidance, shall be applied by the contractor to any contract activities and expenses, and may be amended from time to time.

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EXHIBIT B

SCOPE OF SERVICES

The Contractor, FUTURE IN SIGHT (FIS) shall provide independent living (IL) services based on the Federal regulation 45 CFR Part 1329 per the Workforce Innovation Opportunity Act (WIOA), upon Governor and Council approval, through September 30, 2023.

The scope of the work for FIS shall include the contractor identifying individuals who may be eligible for services, develop documentation in support of their eligibility and complete a plan to utilize appropriate and necessary independent living "core" or traditional services.

According to the Administration on Community Living and Definitions in 45 CFR 1329.4 "Independent Living Core services (ILS or CIL) mean, for purposes of services that are supported under ILS or CIL programs-

- 1) Information and referral services;
- 2) Independent Living skills training;
- 3) Peer counseling, including cross-disability peer counseling;
- 4) Individual and systems advocacy;
- 5) Services that:
 - i. Facilitate the transition of individuals with significant disabilities from nursing homes and other institutions to home and community-based residences, with the requisite supports and services."
 - ii. "Provide assistance to individuals with significant disabilities who are at risk of entering institutions so that the individual may remain in the community."
 - iii. Facilitate the transition of youth who are individual's with significant disabilities, who were eligible for individualized education programs under IDEA.

FUTURE IN SIGHT shall:

1. Employ personnel who are specialists for the development and provision of independent living services (IL) in accordance with 45 CFR 1329.
2. Provide information about IL services make referrals to other programs for individuals with significant disabilities as required under 45 CFR 1329.
3. The Contractor shall obtain medical, psychological, psychiatric, educational, vocational, social and financial information necessary to support eligibility for services.
4. The Contractor shall assist applicants in completion of any necessary forms and will develop an Independent Living Plan (ILP) prior to service provision.
5. The Contractor shall coordinate services with other state and local programs to avoid duplication of services.
6. The Contractor shall develop and maintain a consumer service record for each IL program customer. Documentation shall include eligibility decisions signed and dated by the

EXHIBIT B CONTINUED

- Service Coordinator, services requested by the customer, the ILP, the services actually provided and goals achieved by the customer as a result of the IL services.
7. The Contractor shall apply for and document in the customer case record specific comparable benefits sought and obtained, prior to billing the Department of Education, Division of Workforce Innovation, Independent Living Program.
 8. The ILP shall identify the service(s) to be received, the approximate cost and duration, the provider, the goal of the program, the intermediate objectives and a review of each objective at specified points.
 9. The Contractor shall assist the customer in the completion of a financial needs test per 12 month period which begins on the date of eligibility, for a service or combination of services. Services provided will be contingent upon financial need.
 10. If a service has been denied to a customer, that decision, along with rationale should be provided to the customer and appeal rights provided.
 11. The Contractor shall maintain contact with customers and services providers to ensure that services are being delivered in a timely and appropriate manner. Contacts will be documented in the customer service record.
 12. The Contractor shall coordinate service delivery between service providers and eligible customers to ensure timely and appropriate services until each customer's program is determined to be inactive or closed.
 13. The Contractor shall provide quarterly reports indicating customers served and total number of hours provided. At the end of the contract period a final report shall incorporate total number of consumers served, services provided under each service category of the contract.
 14. Information System to produce the Title VI, Part B 704 annual performance report as required by 45 CFR 1329.
 15. All services provided are available statewide.

DELIVERABLES AND TIMELINE

A. Independent Living Core Services

1. Information and referral (I&R) services: All direct service staff conduct I&R services as an integrated part of their role. I&R services are based upon the needs identified by the direct service staff in conjunction with the individual client. Information is shared regarding our services as well as other services that are beneficial in the disability field or beyond.
2. Independent living skills training: Future In Sight employs a staff of professionals who provide holistic services to individuals who are living with vision loss. The services are designed to address areas of difficulty which impede the individual's ability to live independently and safely. These services help keep individuals in their homes by addressing those activities that allow someone to be independent and safe, but also help to bring people from institutions back to their home. These same services assist transition-age students with vision loss move from the school setting to either post-secondary education or to the community and employment.


Date 1/11/22

EXHIBIT B CONTINUED

3. Peer counseling, including cross-disability peer counseling: FIS's Board of Director's are comprised of a minimum of 50% individuals with disabilities. They also employ staff that provide holistic services to individuals who are living with vision loss, which allows them to provide peer counseling and understanding on a level not possible for people with different life experiences.
4. Individual and systems advocacy: In addition to FIS'S active systems advocacy in which consumers receive training on successful advocacy on a systems level, FIS staff works with consumers on an individual basis to assist them with enhancing self-advocacy skills. This is customized based upon individual experiences and the situation at hand.
5. Transition services that:
 - a. Facilitate the transition of individuals with significant disabilities from nursing homes and other institutions to home and community-based residences, with the requisite supports and services
 - b. Aid individuals with significant disabilities who are at risk of entering an institution so that the individuals may remain in the community:
 - c. Facilitate the transition of youth who are individuals with significant disabilities, who were eligible for individual education plans.

B. Low Vision Training

Optimize remaining vision through the use of magnification (handheld or electronic) with a focus on lighting and contrast. This allows for the greatest ease of reading. This is particularly important in reading medication bottles for greater health, reading bills and having the ability to make payments, seeing recipes for healthier eating, etc.

C. Rehabilitation Therapy

Provide training and devices that assist with daily activities such as techniques for safe use of stove for cooking, assessing the home for trips/falls hazards, optimizing communication (use of telephone for emergencies as well as connecting with others, and use of computers/laptops and mobile devices).

D. Orientation & Mobility

Focus on safe mobility both in the home and community; teaches techniques to allow for safe use of stairs, crossing street intersections, and use of mobile devices as a navigation tool.

E. Assistive Technology Training

Identify devices that will meet an individual's needs to achieve a higher level of independence. Create a training program to allow an individual to competently and confidently use the assistive technology devices with success. Technology Users groups provide an opportunity for those living with vision loss to obtain first-hand information from their peers about the technology that works for them.

F. Aids & Devices

During the evaluation and provision of independent living services, the service provider works with the individual to identify barriers to independence. As part of this process, aids and devices are identified which minimize or eliminate those barriers. Once the

EXHIBIT B CONTINUED

recommended aids and devices have been obtained, staff provide training on effective utilization based upon individual needs and learning styles.

G. Transportation

Transportation is one of the most difficult challenges for those who are living with vision loss, especially those living in rural areas without access to public transportation. Our volunteer transportation program provides rides to perform essential tasks such as attending medical appointments, going grocery shopping, etc. Additionally, staff understand local transportation options, and provide I&R services to encourage clients to access local resources. Without transportation services, individuals are at a higher risk of institutionalization.

H. Telecommunications Equipment Assistance Program

Future In Sight is the current contractor through the Governor's Commission on Disability to provide TEAP (Telecommunications Equipment Assistance Program) devices and supports for individuals with a wide range of disabilities, including those who are Deaf, hard of hearing, deaf/blind, and/or who have other sensory, speech or mobility impairments which create difficulty in utilizing conventional telephone equipment.

I. Performance Goals

Future In Sight expects to provide 400 hours of service to up to 100 clients with direct service in their home and hundreds more access to peer support and technology resources that build their skills and independence. An average client receives at least four hours of direct services from a combination of staff. Our Client Management System (CMS) captures and tracks all aspects of the service that we provide and demographics of our clients. Database information includes biographical information, financial information, health information, services that are provided, referrals that are made, etc.

1. Provide 400 hours of service to up to 100 individual clients over the course of each year with direct, in-home services, which support independence;
2. Provide recommended aids & devices at an average cost of \$150 per individual for those who do not otherwise have the ability to pay for such tools;
3. Conduct a client satisfaction survey after the completion of all services. A volunteer calls all clients to obtain their feedback on the services they received.

J. Program Evaluation

The Contractor shall conduct bi-annual customer satisfaction surveys as documentation of quality assurance and program evaluation. The survey will document the individuals satisfaction with the services provided, measuring the extent to which the services received improved the consumer's ability to live independently. Results shall be sent to the Department of Education bi-annually.

EXHIBIT B CONTINUED

K. Reporting

- Summary reports will be provided to the Department on a quarterly basis. This report will include a quarterly itemized expenditure report and budget reconciliation report.
- All Part B funds must be tracked separately, as well as services that were provided by the resources. Monthly reports will include type of service being provided, staff providing the service, date of the service, hours of the service and consumers receiving the service. The first report and invoice will be due the 15th day of the month after approval, and the 15th of the month, thereafter.
- Program site visits can be conducted with a two-week notice, indicating the information that will be reviewed, including a comprehensive financial review.


4/11/22

EXHIBIT C

BUDGET

	FY2022	FY2023	FY2024	Total
Personnel Expenses	\$23,059	\$30,892	\$7,686	\$61,637
Mileage Reimbursement	\$1,759	\$2,311	\$587	\$4,657
Cost of Aids & Devices	\$5,612	\$7,371	\$1,871	\$14,854
Total	\$30,430	\$40,574	\$10,144	\$81,148

Limitation on Price: Upon mutual agreement between the state contracting officer and the contractor, line items in this budget may be adjusted one to another, but in no case shall the total budget exceed \$81,148.

Funding Source: Funds to support this request are available in the account titled Independent SVCS PT B-Federal and Independent SVCS PT B-State in FY2022 and FY2023, and anticipated to be available in FY2024, upon the availability and continued appropriation of funds in the future operating budget, with the ability to adjust encumbrances between State Fiscal years through the Budget Office, without further Governor and Council approval, if needed and justified.

	<u>FY2022</u>	<u>FY2023</u>	<u>FY2024</u>
06-56-56-565010-25420000-102-500731	\$1,369.90	\$1,827.20	\$457.30
Contracts for Program Services			
06-56-56-565010-30060000-601-500931	<u>\$29,060.10</u>	<u>\$38,746.80</u>	<u>\$9,686.70</u>
State Fund Match			
Total	\$30,430.00	\$40,574.00	\$10,144.00

Method of Payment: Payment is to be made on the basis of invoices which are supported by a summary of completed deliverables, as outlined by budget line, that have taken place in accordance with the terms of the contract, along with a detailed listing of expenses incurred. If otherwise correct and acceptable, payment will be made for 100% of the expenditures listed. A final invoice is due within 30 days of the end of this contract. Invoices and reports shall be electronically submitted to:

Dan Frye, Administrator, Services for Blind and Visually Impaired
Daniel.B.Frye@doe.nh.gov
Copy to:
Lisa Hinson-Hatz, Vocational Rehabilitation
Lisa.K.Hatz@doe.nh.gov

EXHIBIT D**Contractor Obligations**

Contracts in excess of the simplified acquisition threshold (currently set at \$250,000) must address **administrative, contractual, or legal remedies** in instances where the contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate. Reference: 2 C.F.R. § 200.326 and 2 C.F.R. 200, Appendix II, required contract clauses.

The contractor acknowledges that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the contractor's actions pertaining to this contract.

The Contractor, certifies and affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. § 3801 et seq., apply to this certification and disclosure, if any.

Breach

A breach of the contract clauses above may be grounds for termination of the contract, and for debarment as a contractor and subcontractor as provided in 29 C.F.R. § 5.12.

Fraud and False Statements

The Contractor understands that, if the project which is the subject of this Contract is financed in whole or in part by federal funds, that if the undersigned, the company that the Contractor represents, or any employee or agent thereof, knowingly makes any false statement, representation, report or claim as to the character, quality, quantity, or cost of material used or to be used, or quantity or quality work performed or to be performed, or makes any false statement or representation of a material fact in any statement, certificate, or report, the Contractor and any company that the Contractor represents may be subject to prosecution under the provision of 18 USC § 1001 and § 1020.

Environmental Protection

(This clause is applicable if this Contract exceeds \$150,000. It applies to Federal-aid contracts only.)

The Contractor is required to comply with all applicable standards, orders or requirements issued under Section 306 of the Clean Air Act (42 U.S.C. 1857 (h)), Section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency (EPA) regulations (40 CFR Part 15) which prohibit the use under non-exempt Federal contracts, grants or loans of facilities included on the EPA List of Violating Facilities. Violations shall be reported to the FHWA and to the U.S. EPA Assistant Administrator for Enforcement.

Procurement of Recovered Materials

In accordance with Section 6002 of the Solid Waste Disposal Act (42 U.S.C. § 6962), State agencies and agencies of a political subdivision of a state that are using appropriated Federal funds for procurement must procure items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired in the preceding fiscal year exceeded \$10,000; must procure solid waste management services in a manner that maximizes energy and resource recovery; and must have established an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Contractor Initials

Date

RW

4/1/22

Exhibit E

Federal Debarment and Suspension

- a. By signature on this Contract, the Contractor certifies its compliance, and the compliance of its Sub-Contractors, present or future, by stating that any person associated therewith in the capacity of owner, partner, director, officer, principal investor, project director, manager, auditor, or any position of authority involving federal funds:
1. Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal Agency;
 2. Does not have a proposed debarment pending;
 3. Has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal Agency within the past three (3) years; and
 4. Has not been indicted, convicted, or had a civil judgment rendered against the firm by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three (3) years.
- b. Where the Contractor or its Sub-Contractor is unable to certify to the statement in Section a.1. above, the Contractor or its Sub-Contractor shall be declared ineligible to enter into Contract or participate in the project.
- c. Where the Contractor or Sub-Contractor is unable to certify to any of the statements as listed in Sections a.2., a.3., or a.4., above, the Contractor or its Sub-Contractor shall submit a written explanation to the DOE. The certification or explanation shall be considered in connection with the DOE's determination whether to enter into Contract.
- d. The Contractor shall provide immediate written notice to the DOE if, at any time, the Contractor or its Sub-Contractor, learn that its Debarment and Suspension certification has become erroneous by reason of changed circumstances.

Contractor Initials

Date

JL
4/11/22

Exhibit F

Anti-Lobbying

The Contractor agrees to comply with the provisions of Section 319 of Public Law 101-121, Government wide Guidance for New Restrictions on Lobbying, and 31 U.S.C. 1352, and further agrees to have the Contractor's representative, execute the following Certification:

The Contractor certifies, by signing and submitting this contract, to the best of his/her knowledge and belief, that:

- a. No federal appropriated funds have been paid or shall be paid, by or on behalf of the undersigned; to any person for influencing or attempting to influence any officer or employee of any State or Federal Agency, a Member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any Federal contract, the making of any federal grant, the making of any federal loan, the entering into any cooperative agreement, and the extension, continuation, renewal amendment, or modification of any Federal contract grant, loan, or cooperative agreement.
- b. If any funds other than federally appropriated funds have been paid or shall be paid to any person for influencing or attempting to influence an officer or employee of any Federal Agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit the "Disclosure of Lobbying Activities" form in accordance with its instructions (<http://www.whitehouse.gov/omb/grants/sffilin.pdf>).
- c. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making and entering into this transaction imposed by Section 1352, Title 31 and U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.
- d. The Contractor also agrees, by signing this contract that it shall require that the language of this certification be included in subcontracts with all Sub-Contractor(s) and lower-tier Sub-Contractors which exceed \$100,000 and that all such Sub-Contractors and lower-tier Sub-Contractors shall certify and disclose accordingly.
- e. The DOE shall keep the firm's certification on file as part of its original contract. The Contractor shall keep individual certifications from all Sub-Contractors and lower-tier Sub-Contractors on file. Certification shall be retained for three (3) years following completion and acceptance of any given project.

Contractor Initials

Date

RUA
4/11/22

Exhibit G

Rights to Inventions Made Under a Contract, Copy Rights and Confidentiality

Rights to Inventions Made Under a Contract or Agreement

Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the DOE.

Any discovery or invention that arises during the course of the contract shall be reported to the DOE. The Contractor is required to disclose inventions promptly to the contracting officer (within 2 months) after the inventor discloses it in writing to contractor personnel responsible for patent matters. The awarding agency shall determine how rights in the invention/discovery shall be allocated consistent with "Government Patent Policy" and Title 37 C.F.R. § 401.

Confidentiality

All Written and oral information and materials disclosed or provided by the DOE under this agreement constitutes Confidential Information, regardless of whether such information was provided before or after the date on this agreement or how it was provided.

The Contractor and representatives thereof, acknowledge that by making use of, acquiring or adding to information about matters and data related to this agreement, which are confidential to the DOE and its partners, must remain the exclusive property of the DOE.

Confidential information means all data and information related to the business and operation of the DOE, including but not limited to all school and student data contained in NH Title XV, Education, Chapters 186-200.

Confidential information includes but is not limited to, student and school district data, revenue and cost information, the source code for computer software and hardware products owned in part or in whole by the DOE, financial information, partner information (including the identity of DOE partners), Contractor and supplier information, (including the identity of DOE Contractors and suppliers), and any information that has been marked "confidential" or "proprietary", or with the like designation. During the term of this contract the Contractor agrees to abide by such rules as may be adopted from time to time by the DOE to maintain the security of all confidential information. The Contractor further agrees that it will always regard and preserve as confidential information/data received during the performance of this contract. The Contractor will not use, copy, make notes, or use excerpts of any confidential information, nor will it give, disclose, provide access to, or otherwise make available any confidential information to any person not employed or contracted by the DOE or subcontracted with the Contractor.

Ownership of Intellectual Property

The DOE shall retain ownership of all source data and other intellectual property of the DOE provided to the Contractor in order to complete the services of this agreement. As well the DOE will retain copyright ownership for any and all materials, patents and intellectual property produced, including, but not limited to, brochures, resource directories, protocols, guidelines, posters, or reports. The Contractor shall not reproduce any materials for purposes other than use for the terms under the contract without prior written approval from the DOE.

Contractor Initials

Date

[Handwritten Signature]
4/21/22

State of New Hampshire

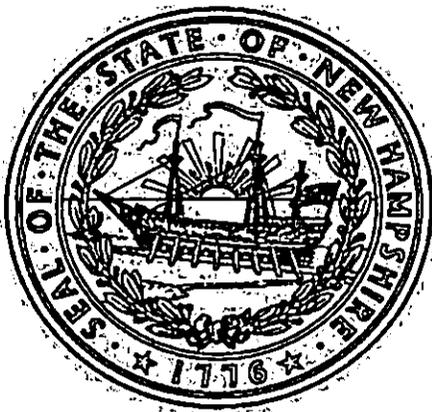
Department of State

CERTIFICATE

I, William M. Gardner, Secretary of State of the State of New Hampshire, do hereby certify that FUTURE IN SIGHT is a New Hampshire Trade Name registered to transact business in New Hampshire on January 25, 2017. I further certify that all fees and documents required by the Secretary of State's office have been received and is in good standing as far as this office is concerned; and the attached is a true copy of the list of documents on file in this office.

Business ID: 763739

Certificate Number: 0005408073



IN TESTIMONY WHEREOF,

I hereto set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 15th day of July A.D. 2021.

A handwritten signature in black ink, appearing to read "William M. Gardner".

William M. Gardner
Secretary of State

State of New Hampshire
Department of State

CERTIFICATE

I, William M. Gardner, Secretary of State of the State of New Hampshire, do hereby certify that NEW HAMPSHIRE ASSOCIATION FOR THE BLIND is a New Hampshire Nonprofit Corporation registered to transact business in New Hampshire on November 10, 1933. I further certify that all fees and documents required by the Secretary of State's office have been received and is in good standing as far as this office is concerned.

Business ID: 63495



IN TESTIMONY WHEREOF,

I hereto set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 24th day of March A.D. 2017.

A handwritten signature in cursive script, appearing to read "Wm Gardner".

William M. Gardner
Secretary of State



**FUTURE
IN SIGHT**

P: 603 224 4039
F: 603 224 4378
www.futureinsight.org

**New Hampshire Association for the Blind
(dba Future In Sight)**

RESOLUTION

I, Charlie Mathews, hereby certify that I am the duly elected and acting Vice Chairman of New Hampshire Association for the Blind, a New Hampshire non-profit corporation doing business as Future In Sight (the "Corporation",) and hereby certify as follows:

I hereby certify that a vote of the Board of Directors of the Corporation was duly recorded the 23rd day of December 2021, at which time every member of the board of directors consented in writing as prescribed in the Bylaws of the New Hampshire Association for the Blind, and the following resolution was adopted by a majority of the consents received, and as of the date hereof, has not been rescinded or modified:

"RESOLVED that the following employees of the Corporation:

Randy Pierce, President & CEO is fully authorized and empowered to sign all documents required to execute a contract with the State of New Hampshire's Department of Education.

This resolution shall stay in effect until further notice.

IN WITNESS WHEREOF, the undersigned has executed and delivered this Certificate on the 11th day of January, 2022

Charlie P. Mathews 1/11/2022
Vice Chairman Date



NHASSOC-03

DBEAUDOIN

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/20/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s):

PRODUCER Davis & Towle Morrill & Everett, Inc. 115 Airport Road Concord, NH 03301	CONTACT NAME: PHONE (A/C, No, Ext): (603) 225-6611 FAX (A/C, No): (603) 225-7935	
	E-MAIL ADDRESS:	
INSURED NH Association for the Blind DBA Future in Sight 25 Walker Street Concord, NH 03301	INSURER(S) AFFORDING COVERAGE	
	INSURER A: The Hanover Insurance Companies NAIC # 22292	
	INSURER B: Granite State Health Care & Human Services Self Insured Group	
	INSURER C:	
	INSURER D:	
	INSURER E:	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO JECT <input type="checkbox"/> LOC OTHER:				11/1/2021	11/1/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COM/PROP AGG \$ Included PROFESSIONAL LI \$ 1,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY				11/1/2021	11/1/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 0				11/1/2021	11/1/2022	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A		2/1/2022	2/1/2023	PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Worker's Compensatio				2/1/2022	2/1/2023	Excess Insurance \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Workers Compensation Information

3A State: NH

With regard to Professional Liability, employees are included as insureds while performing duties related to the conduct of the insured's organization.

CERTIFICATE HOLDER

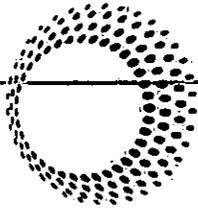
CANCELLATION

Department of Education
 21 Fruit Street
 Concord, NH 03301

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Diane P. Beaudoin



FUTURE IN SIGHT

P: 603 224 4039
F: 603 224 4378
www.futureinsight.org

Lisa Hinson-Hatz, VR Director
21 South Fruit Street, Suite 20
Concord NH 03301

September 7, 2021

Dear Ms. Hinson-Hatz,

Please accept the attached documents as supplements to the Title VII Part B Contract, as requested.

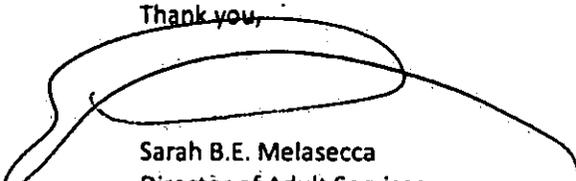
Future In Sight's mission is:

Future In Sight transforms the lives of infants and children, adults and seniors who are blind and visually impaired through education, training and support.

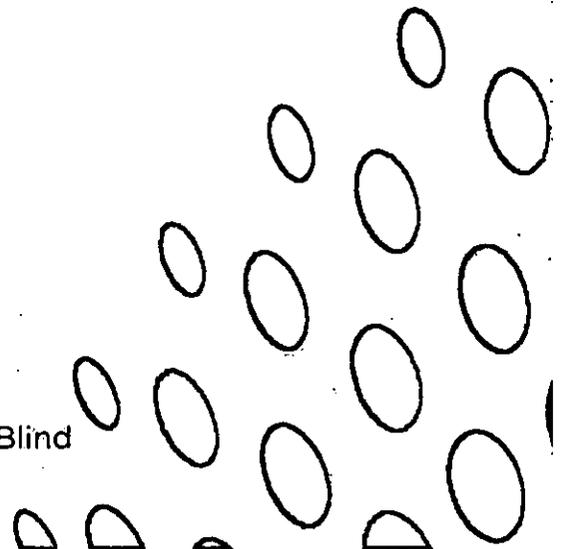
Tim Murray, Interim CEO, will be signing the contract.

Thank you for the opportunity to partner with you to enhance the services available to those who are blind and visually impaired in New Hampshire.

Thank you,



Sarah B.E. Melasecca
Director of Adult Services
Future In Sight
603-565-2411 (direct)





New Hampshire Association for the Blind d/b/a Future in Sight

FINANCIAL STATEMENTS

August 31, 2020

(with comparative totals for August 31, 2019)

With Independent Auditor's Report





INDEPENDENT AUDITOR'S REPORT

Board of Directors
New Hampshire Association for the Blind
d/b/a Future In Sight

We have audited the accompanying financial statements of New Hampshire Association for the Blind d/b/a Future In Sight (the Association), which comprise the statement of financial position as of August 31, 2020, and the related statements of activities and changes in net assets, functional expenses and cash flows for the years then ended, and the related notes to the financial statements.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with U.S. generally accepted accounting principles; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with U.S. generally accepted auditing standards. These standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.



Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Association as of August 31, 2020, and the changes in its net assets and its cash flows for the year then ended in accordance with U.S. generally accepted accounting principles.

Other Matters

Change in Accounting Principle

As discussed in Note 1 to the financial statements, the Association adopted Financial Accounting Standards Board Accounting Standards Update No. 2018-08, *Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made*, during the year ended August 31, 2020. Our opinion is not modified with respect to this matter.

Report on Summarized Comparative Information

We previously audited the financial statements of the Association as of and for the year ended August 31, 2019, and in our report dated January 2, 2020 we expressed an unmodified opinion on those statements. In our opinion, the summarized comparative information presented herein as of and for the year ended August 31, 2019 is otherwise consistent, in all material respects, with the audited financial statements from which it has been derived.

Berry Dunn McNeil & Parker, LLC

Manchester, New Hampshire
January 7, 2021

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Statement of Financial Position

**August 31, 2020
(with comparative totals for August 31, 2019)**

ASSETS

	<u>2020</u>	<u>2019</u>
Current assets		
Cash and cash equivalents	\$ 248,566	\$ 69,264
Accounts receivable, net of allowance for doubtful accounts	80,329	82,318
Interest and dividends receivable	23,212	24,461
Current portion of contributions receivable	82,919	212,873
Supplies	37,056	27,786
Prepaid and reimbursable expenses	<u>37,815</u>	<u>12,207</u>
Total current assets	<u>509,897</u>	<u>428,909</u>
Property and equipment, net	<u>612,377</u>	<u>615,098</u>
Other assets		
Contributions receivable, net of current portion	12,761	25,406
Investments - charitable gift annuities	64,046	60,735
Investments - deferred compensation	-	47,474
Investments	8,667,464	7,719,228
Beneficial interest in trusts	<u>1,970,418</u>	<u>1,813,259</u>
Total other assets	<u>10,714,689</u>	<u>9,666,102</u>
Total assets	<u>\$11,836,963</u>	<u>\$10,710,109</u>

The accompanying notes are an integral part of these financial statements.

LIABILITIES AND NET ASSETS

	<u>2020</u>	<u>2019</u>
Current liabilities		
Current portion of long-term debt	\$ 27,246	\$ 27,246
Accounts payable and accrued expenses	37,212	36,762
Accrued payroll and related taxes	126,698	95,738
Deferred revenue	47,378	-
Current portion of charitable gift annuities obligation	2,885	2,885
CARES Act funding advance	358,100	-
Current portion of deferred compensation	<u>-</u>	<u>23,238</u>
Total current liabilities	599,519	185,869
Long-term liabilities		
Long-term debt, less current portion	9,416	29,825
Charitable gift annuities obligation, less current portion	<u>42,195</u>	<u>40,529</u>
Total liabilities	<u>651,130</u>	<u>256,223</u>
Net assets		
Without donor restrictions	7,191,858	6,144,766
With donor restrictions	<u>3,993,975</u>	<u>4,309,120</u>
Total net assets	<u>11,185,833</u>	<u>10,453,886</u>
Total liabilities and net assets	<u>\$11,836,963</u>	<u>\$10,710,109</u>

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Statement of Activities and Changes in Net Assets

**Year Ended August 31, 2020
(With Comparative Totals for the Year Ended August 31, 2019)**

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>2020 Total</u>	<u>2019 Total</u>
Public support, revenue and releases				
Public support	\$ 694,850	\$ 239,092	\$ 933,942	\$ 1,876,405
Service revenue	1,061,762	-	1,061,762	1,067,461
Endowment spending draw for operations	<u>514,830</u>	<u>-</u>	<u>514,830</u>	<u>535,358</u>
Total public support and revenue, including endowment draw for operations	2,271,442	239,092	2,510,534	3,479,224
Net assets released from restrictions for satisfaction of program restrictions	<u>874,920</u>	<u>(874,920)</u>	<u>-</u>	<u>-</u>
Total public support, revenue and releases	<u>3,146,362</u>	<u>(635,828)</u>	<u>2,510,534</u>	<u>3,479,224</u>
Expenses				
Program services	1,760,518	-	1,760,518	1,693,890
Public support	267,339	-	267,339	252,160
General and administration	<u>526,831</u>	<u>-</u>	<u>526,831</u>	<u>469,349</u>
Total expenses	<u>2,554,688</u>	<u>-</u>	<u>2,554,688</u>	<u>2,415,399</u>
Change in net assets from operations	<u>591,674</u>	<u>(635,828)</u>	<u>(44,154)</u>	<u>1,063,825</u>
Nonoperating activities and transfers				
Realized and unrealized gains on investments	701,753	214,076	915,829	154,914
Interest and dividend income	121,857	29,662	151,519	148,746
Change in value of charitable gift annuities	-	(4,551)	(4,551)	(5,734)
Investment income from trusts	70,975	-	70,975	58,315
Endowment spending draw for operations	(439,167)	(75,663)	(514,830)	(535,358)
Change in value of beneficial interest in trusts	-	157,159	157,159	(49,016)
Loss on disposal of property and equipment	<u>-</u>	<u>-</u>	<u>-</u>	<u>(2,516)</u>
Total nonoperating activities and transfers	<u>455,418</u>	<u>320,683</u>	<u>776,101</u>	<u>(230,649)</u>
Change in net assets	1,047,092	(315,145)	731,947	833,176
Net assets, beginning of year	<u>6,144,766</u>	<u>4,309,120</u>	<u>10,453,886</u>	<u>9,620,710</u>
Net assets, end of year	<u>\$ 7,191,858</u>	<u>\$ 3,993,975</u>	<u>\$ 11,185,833</u>	<u>\$ 10,453,886</u>

The accompanying notes are an integral part of these financial statements.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Statement of Functional Expenses

**Year Ended August 31, 2020
(With Comparative Totals for the Year Ended August 31, 2019)**

	<u>Program Services</u>	<u>Public Support</u>	<u>General and Administration</u>	<u>2020 Total</u>	<u>2019 Total</u>
Direct expenses:					
Personnel expenses	\$ 1,363,700	\$ 200,762	\$ 422,284	\$ 1,986,746	\$ 1,743,444
Client aids and program supplies	24,853	-	-	24,853	30,706
Client programs and transportation	3,772	-	-	3,772	8,998
Professional fees	63,841	3,027	50,216	117,084	122,238
Staff training and development	13,057	-	11,872	24,929	15,992
Office equipment and supplies	41,866	30,726	7,568	80,160	66,518
Telephone	239	415	-	654	727
Postage and shipping	3,729	2,985	640	7,354	1,279
Travel	74,042	761	2,227	77,030	122,086
Events and activities	4,486	2,122	1,333	7,941	28,567
Printing and publications	17,784	8,716	264	26,764	19,575
Dues and subscriptions	4,033	1,151	5,190	10,374	6,901
Interest expense	-	-	360	360	717
Miscellaneous	1,121	2,096	3,051	6,268	9,403
Bad debt expense	<u>4,066</u>	<u>-</u>	<u>-</u>	<u>4,066</u>	<u>6,161</u>
Total direct expenses	<u>1,620,589</u>	<u>252,761</u>	<u>505,005</u>	<u>2,378,355</u>	<u>2,183,312</u>
Indirect expenses:					
Occupancy, including depreciation	90,355	9,499	14,248	114,102	122,188
Information technology and general office	<u>49,574</u>	<u>5,079</u>	<u>7,578</u>	<u>62,231</u>	<u>109,899</u>
Total indirect expenses	<u>139,929</u>	<u>14,578</u>	<u>21,826</u>	<u>176,333</u>	<u>232,087</u>
Total functional expenses	<u>\$ 1,760,518</u>	<u>\$ 267,339</u>	<u>\$ 526,831</u>	<u>\$ 2,554,688</u>	<u>\$ 2,415,399</u>

The accompanying notes are an integral part of these financial statements.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Statement of Cash Flows

**Year Ended August 31, 2020
(With Comparative Totals for the Year Ended August 31, 2019)**

	<u>2020</u>	<u>2019</u>
Cash flows from operating activities		
Change in net assets	\$ 731,947	\$ 833,176
Adjustments to reconcile change in net assets to net cash (used) provided by operating activities		
Depreciation	44,758	52,808
Bad debt expense	4,066	6,161
(Increase) decrease in value of beneficial interest in trusts	(157,159)	49,016
Loss on disposal of property and equipment	-	2,516
Net realized and unrealized gain on investments	(915,829)	(154,914)
Change in value of charitable gift annuities	4,551	5,734
(Increase) decrease in		
Accounts receivable, net of allowance for doubtful accounts	(2,077)	(10,413)
Contributions receivable	142,599	(196,803)
Supplies	(9,270)	(4,041)
Prepaid and reimbursable expenses	(25,608)	20,200
Increase (decrease) in		
Accounts payable	450	(4,435)
Accrued payroll and related taxes	30,960	(5,539)
Deferred revenue	47,378	(710)
Proceeds from CARES Act funding advance	358,100	-
Deferred compensation	(23,238)	(21,888)
Net cash provided by operating activities	<u>231,628</u>	<u>570,868</u>
Cash flows from investing activities		
Proceeds from sales of investments	1,154,715	1,041,771
Purchases of investments	(1,144,595)	(1,549,977)
Purchases of property and equipment	(42,037)	(29,238)
Net cash used by investing activities	<u>(31,917)</u>	<u>(537,444)</u>
Cash flows from financing activities		
Principal payments on the note payable	(20,409)	(26,975)
Net increase in cash and cash equivalents	179,302	6,449
Cash and cash equivalents beginning of year	<u>69,264</u>	<u>62,815</u>
Cash and cash equivalents, end of year	<u>\$ 248,566</u>	<u>\$ 69,264</u>

The accompanying notes are an integral part of these financial statements.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

Nature of Activities

The New Hampshire Association for the Blind d/b/a Future In Sight (the Association) is a nonprofit organization established in 1912 and incorporated in 1933 under the laws of the State of New Hampshire. The primary mission of the Association is to provide social and rehabilitation services on a year-round, statewide basis to meet the special needs of New Hampshire's residents with severe vision loss.

The Association utilizes a team approach to the rehabilitation process encompassing individual and family counseling, orientation and mobility training, rehabilitation teaching (daily living skills), low vision clinics, and educational services. In addition, the Association maintains an active speakers' bureau and engages in public education and prevention activities disseminating information statewide, via direct mail and the media, concerning blindness, eye conditions and diseases, eye health care and safety, availability of rehabilitation services and related subject matters to promote greater awareness to the general public of the importance of eye care.

The Association's headquarters is located in Concord, New Hampshire. The Association cooperates and collaborates with other New Hampshire human service organizations and health care providers for informational and referral purposes. It performs low vision examinations and prescribes and trains clients in the use of low vision aids and rehabilitation devices.

The Association is dependent, to a significant extent, upon contributions from the general public for annual support of its operations and services. Contributions are obtained through a year-round approach that encompasses solicitation by direct mail, in-person, and at special events, proposals for funding to foundations and to, individuals for planned gifts, and other related development activities which generate public support.

1. Summary of Significant Accounting Policies

Newly Adopted Accounting Pronouncement

In July 2018, the Financial Accounting Standards Board (FASB) issued Accounting Standards Update (ASU) No. 2018-08, *Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made*, to clarify and improve the accounting guidance for contributions received and contributions made. The amendments in this ASU assist entities in (1) evaluating whether transactions should be accounted for as contributions (nonreciprocal transactions) within the scope of FASB Accounting Standards Codification (ASC) Topic 958, *Not-for-Profit Entities*, or as exchange (reciprocal) transactions subject to other accounting guidance, and (2) distinguishing between conditional contributions and unconditional contributions. This ASU was adopted by the Association during the year ended August 31, 2020 and is reflected in the accompanying financial statements. Adoption of the ASU did not have a material impact on the Association's financial reporting.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

Basis of Presentation

Net assets and revenues, expenses, gains and losses are classified as follows based on the existence or absence of donor-imposed restrictions:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Association. These net assets may be used at the discretion of the Association's management and the Board of Directors.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors and grantors. Some donor restrictions are temporary in nature; those restrictions are to be met by actions of the Association or by the passage of time. Other donor restrictions are perpetual in nature, whereby the donor has stipulated the funds be maintained in perpetuity.

Use of Estimates

The preparation of financial statements in conformity with U.S. generally accepted accounting principles (U.S. GAAP) requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements. Estimates also affect the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Comparative Financial Information

The financial statements include certain prior-year summarized comparative information in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity with U.S. GAAP. Accordingly, such information should be read in conjunction with the Association's financial statements for the year ended August 31, 2019, from which the summarized information was derived.

Contributions

Contributions are considered to be available for use without donor restrictions unless specifically restricted by the donor. Amounts received that are designated for future periods or restricted by the donor for a specific purpose are reported as increases in net assets with donor restrictions. When a restriction expires, net assets with donor restrictions temporary in nature are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions.

The Association uses the allowance method to provide for uncollectible unconditional promises receivable. The allowance is based on prior years' experience and management's analysis of specific promises made.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

Income Taxes

The Association is a public charity under Section 501(c)(3) of the Internal Revenue Code. As a public charity, the Association is exempt from state and federal income taxes on income earned in accordance with its tax-exempt purpose. Unrelated business income is subject to state and federal income tax. Management has evaluated the Association's tax positions and concluded that the Association has no unrelated business income or uncertain tax positions that require adjustment to the financial statements.

Cash and Cash Equivalents

The Association considers all highly liquid investments with an original maturity date of less than three months to be cash equivalents.

The Association maintains its cash in bank deposit accounts which, at times, may exceed federally-insured limits. It has not experienced any losses in such accounts. Management believes it is not exposed to any significant risk on cash and cash equivalents.

Accounts Receivable

Accounts receivable are stated at the amount management expects to collect from balances outstanding at year-end. Management provides for probable uncollectible accounts after considering each category of receivable individually, and estimates an allowance according to the nature of the receivable. Allowances are estimated from historical performance and projected trends. Balances that are still outstanding after management has used reasonable collection efforts are written off through a charge to the valuation allowance and a credit to trade accounts receivable.

Supplies

Inventories are stated at cost and consist of aids and devices, program supplies and postage.

Functional Allocation of Expenses

Direct expenses are charged to their specific program as incurred. Any expenditures not directly chargeable are allocated among the functions benefited based on the proportion of time spent on each function by the staff.

Advertising

The Association follows the policy of charging the costs of advertising to expense as incurred with the exception of certain development supplies that are included in inventory and expensed when utilized. Advertising expense for the years ended August 31, 2020 and 2019 amounted to \$4,425 and \$4,768, respectively.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

Property and Equipment

Property and equipment are recorded at cost, while donations of property and equipment are recorded as support at their estimated fair value at the date of donation. Expenditures for repairs and maintenance are charged against operations. Renewals and betterments which materially extend the life of the assets are capitalized. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as contributions with donor restrictions. Absent donor stipulations regarding how long those donated assets must be maintained, the Association reports expirations of donor restrictions at the time the asset is placed into service. The Association reclassifies net assets with donor restrictions to net assets without donor restrictions at that time.

Depreciation is provided using the straight-line method in amounts designed to amortize the costs of the assets over their estimated useful lives as follows:

	<u>Years</u>
Buildings	33
Building improvements	3-33
Furniture and equipment	5-20
Software	3

Subsequent Events

For purposes of the preparation of these financial statements in conformity with U.S. GAAP, management has considered transactions or events occurring through January 7, 2021, which is the date that the financial statements were available to be issued. Management has not evaluated subsequent events after that date for inclusion in the financial statements.

In November 2020, the Association was notified they would be receiving a bequest of approximately \$670,000 in 2021. The bequest will be recognized as contribution revenue during 2021.

2. Availability and Liquidity of Financial Assets

The Association regularly monitors liquidity required to meet its operating needs and other contractual commitments, while also striving to optimize its available funds. The Association has various sources of liquidity at its disposal, including cash and cash equivalents and a line of credit, as disclosed in Note 8.

For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Association considers all expenditures related to its ongoing operating activities as well as the conduct of services undertaken to support those operating activities.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

In addition to financial assets available to meet general expenditures over the next 12 months, the Association operates with a balanced budget and anticipates collecting sufficient revenue to cover expenditures not covered by donor-restricted resources or, where appropriate, borrowings. Refer to the statements of cash flows, which identify the sources and uses of the Association's cash and cash equivalents.

The following financial assets are expected to be available within one year of the statement of financial position date to meet general expenditures:

	<u>2020</u>	<u>2019</u>
Cash and cash equivalents	\$ 248,566	\$ 69,264
Accounts receivable, net	80,329	82,318
Contributions receivable, net	-	11,036
Investments	458,284	491,964
Expected appropriation of donor-restricted endowed funds for use over the next 12 months	78,988	75,663
Expected appropriation of board-restricted endowed funds for use over the next 12 months	<u>676,400</u>	<u>439,168</u>
Financial assets available to meet general expenditures within one year	<u>\$ 1,542,567</u>	<u>\$ 1,169,413</u>

The Association has board designated long-term investments that are intended to function as an endowment that could be made available for general expenditure upon board approval. Since these investments are currently intended for long-term investments, they have not been included in the information above. The Association has other long-term investments and assets with donor restrictions, which are more fully described in Note 3, that are not available for general expenditure within the next year.

3. Investments

The fair value of the investments is as follows:

	<u>2020</u>	<u>2019</u>
Cash and cash equivalents	\$ 995,204	\$ 703,397
U.S. Government agencies	1,040,177	1,406,332
Corporate and foreign bonds	1,215,049	736,724
Mutual funds	114,220	184,744
Exchange traded funds	133,250	132,743
Equities	<u>5,233,610</u>	<u>4,663,497</u>
	<u>\$ 8,731,510</u>	<u>\$ 7,827,437</u>

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

Investments by class of net assets consist of the following:

	<u>2020</u>	<u>2019</u>
Without donor restrictions	\$ 6,899,338	\$ 5,723,292
With donor restrictions	<u>1,832,172</u>	<u>2,104,145</u>
	<u>\$ 8,731,510</u>	<u>\$ 7,827,437</u>

4. Beneficial Interest in Trusts

The Association is the beneficiary of several irrevocable perpetual trusts, managed by independent financial institutions. The Association has legally enforceable rights and claims to such assets, including the right to income therefrom. Consistent with the provisions of FASB ASC Topic 958 Subtopic 605, *Not-for-Profit Entities - Revenue Recognition*, related to accounting for contributions received, these funds are included in the Association's financial statements. The fair value of the trust assets is reflected as an estimate of the present value of the future cash flows from the trusts and is reported as net assets with donor restrictions held in perpetuity. Appreciation of the trusts is not available for expenditure by the Association unless the trustees decide to appropriate it. Total contributions from these trusts were \$70,975 and \$58,315 in 2020 and 2019, respectively.

5. Contributions Receivable

Contributions receivable consist of the following:

	<u>2020</u>	<u>2019</u>
Contributions receivable	\$ 98,842	\$ 240,458
Present value discount at 2.74%	<u>(3,162)</u>	<u>(2,179)</u>
	95,680	238,279
Less current portion	<u>82,919</u>	<u>212,873</u>
Contributions receivable, net of current portion	<u>\$ 12,761</u>	<u>\$ 25,406</u>

Contributions are due as follows:

Less than one year	\$ 82,919	\$ 212,873
One to five years	<u>15,923</u>	<u>27,585</u>
	<u>\$ 98,842</u>	<u>\$ 240,458</u>

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

6. Fair Value Measurements

ASC Topic 820, *Fair Value Measurement*, defines fair value as the exchange price that would be received for an asset or paid to transfer a liability (an exit price) in the principal or most advantageous market for the asset or liability in an orderly transaction between market participants on the measurement date. ASC Topic 820 also establishes a fair value hierarchy which requires an entity to maximize the use of observable inputs and minimize the use of unobservable inputs when measuring fair value. The standard describes three levels of inputs that may be used to measure fair value:

Level 1: Quoted prices (unadjusted) for identical assets or liabilities in active markets that the entity has the ability to access as of the measurement date.

Level 2: Significant observable inputs other than Level 1 prices, such as quoted prices for similar assets or liabilities, quoted prices in markets that are not active, and other inputs that are observable or can be corroborated by observable market data.

Level 3: Significant unobservable inputs that reflect an entity's own assumptions about the assumptions that market participants would use in pricing an asset or liability.

The Association's assets and liabilities measured at fair value on a recurring basis are as follows as of August 31:

	2020			
	<u>Total</u>	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>
Investments				
Cash and cash equivalents	\$ 995,204	\$ 995,204	\$ -	\$ -
U.S. Government agencies	1,040,177	-	1,040,177	-
Corporate and foreign bonds	1,215,049	-	1,215,049	-
Mutual funds	114,220	114,220	-	-
Exchange traded funds	133,250	133,250	-	-
Equities	<u>5,233,610</u>	<u>5,233,610</u>	-	-
	8,731,510	6,476,284	2,255,226	-
Beneficial interest in perpetual trusts	1,970,418	-	-	1,970,418
Charitable gift annuities obligation	<u>(400,295)</u>	-	-	<u>(400,295)</u>
	<u>\$ 10,301,633</u>	<u>\$ 6,476,284</u>	<u>\$ 2,255,226</u>	<u>\$ 1,570,123</u>

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

	2019			
	<u>Total</u>	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>
Investments				
Cash and cash equivalents	\$ 703,397	\$ 703,397	\$ -	\$ -
U.S. Government agencies	1,406,332	-	1,406,332	-
Corporate and foreign bonds	736,724	-	736,724	-
Mutual funds	184,744	184,744	-	-
Exchange traded funds	132,743	132,743	-	-
Equities	<u>4,663,497</u>	<u>4,663,497</u>	<u>-</u>	<u>-</u>
	7,827,437	5,684,381	2,143,056	-
Beneficial interest in perpetual trusts	1,813,259	-	-	1,813,259
Charitable gift annuities obligation	<u>(40,529)</u>	<u>-</u>	<u>-</u>	<u>(40,529)</u>
	<u>\$ 9,600,167</u>	<u>\$ 5,684,381</u>	<u>\$ 2,143,056</u>	<u>\$ 1,772,730</u>

Fair value of the investments is measured using quoted prices in active markets where available. Fair value of Level 2 investments is primarily based on estimates using market prices of comparable securities. Level 3 liabilities are valued based on life expectancy tables and discounted cash flows.

Fair value of the beneficial interest in perpetual trusts is measured based on quoted market prices of the investments in the trusts, but is classified as Level 3 as there is no market in which to trade the beneficial interest itself.

Changes in the fair value of assets and liabilities classified as Level 3 are comprised of the following:

	Beneficial Interest in Charitable Trusts	Charitable Gift Annuities Obligation
Balance, September 1, 2018	\$ 1,862,275	\$ (40,565)
Change in value	<u>(49,016)</u>	<u>(2,849)</u>
Balance, August 31, 2019	1,813,259	(43,414)
Change in value	<u>157,159</u>	<u>(1,666)</u>
Balance, August 31, 2020	<u>\$ 1,970,418</u>	<u>\$ (45,080)</u>

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

7. Property and Equipment

Property and equipment consists of the following:

	<u>2020</u>	<u>2019</u>
Land	\$ 66,000	\$ 66,000
Building and building improvements	1,453,023	1,416,306
Furniture and office equipment	478,729	470,301
Construction in progress	<u>5,415</u>	<u>8,523</u>
	2,003,167	1,961,130
Less accumulated depreciation	<u>1,390,790</u>	<u>1,346,032</u>
Property and equipment, net	<u>\$ 612,377</u>	<u>\$ 615,098</u>

8. Line of Credit

The Association has borrowing capacity in the maximum amount of \$150,000 under a revolving line of credit arrangement with a local bank. Outstanding advances are payable on demand and collateralized by inventory, chattel paper, accounts, equipment and general intangibles. The interest rate is the Wall Street Journal Prime Rate plus 0.50% (3.75% at August 31, 2020). There was no outstanding balance on the line of credit at August 31, 2020 and 2019.

9. Note Payable

Long-term debt consists of the following:

	<u>2020</u>	<u>2019</u>
Note payable to New Hampshire Health and Education Facilities Authority in monthly principal and interest installments of \$2,308 with interest at 1.00% through September 2021.	\$ 36,662	\$ 57,071
Less current portion	<u>(27,246)</u>	<u>(27,246)</u>
Long-term debt, excluding current portion	<u>\$ 9,416</u>	<u>\$ 29,825</u>

Future maturities of long-term debt are as follows:

2021	\$ 27,246	
2022	<u>9,416</u>	
	<u>\$ 36,662</u>	

Cash paid for interest approximates interest expense for the years ended August 31, 2020 and 2019.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

10. Charitable Gift Annuities

The Association has established a program under which donors may set up charitable gift annuities. Under this program, donors can contribute assets to the Association and in return receive a guaranteed fixed income for life. The Association recognizes contribution revenue for the difference between the fair value of the assets received and the annuity liability.

Annuity liabilities are recorded for the required life annuity payments at the present value of expected future cash payments discounted using current interest rates and actuarial assumptions for those annuities. The annuity obligations are adjusted each year for changes in the life expectancy of the beneficiaries and are reduced as payments are made to the donor. The present value of future payment liabilities of charitable gift annuities was \$45,080 and \$43,414 at August 31, 2020 and 2019, respectively.

11. Retirement Plan

The Association offers employees a 403(b) tax deferred annuity retirement plan based on the Association's maximum contributions of 5% of employee's annual salary. The plan covers all full time and part-time employees working 20 hours or more, who have completed a minimum of six months of service and attained the age of 20 ½. Contributions to the Plan were \$39,798 and \$23,180 for 2020 and 2019, respectively.

12. Concentrations

For the years ended August 31, 2020 and 2019, approximately 36% and 25%, respectively, of total public support, revenue and releases of the Association was derived from State of New Hampshire contracts and school system contracts.

13. Deferred Compensation Plan

The Association entered into Selective Management Compensation Plan agreements whereby the Association recognizes the need to provide additional retirement funding to its key employees in exchange for commitments by these key employees to continue their valued management and leadership. Under the various agreements, if the key employees continue to work for the Association for specified terms, the Association is obligated to make monthly retirement payments. Former key employees participating in the plan have met these terms and the Association was obligated to make payments of \$2,000 a month until August 2020. There was no liability accrued at August 31, 2020. Liabilities accrued under these plans amounted to \$23,238 at August 31, 2019.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

14. Endowment

The Association's endowment includes both donor-restricted endowment funds and funds designated by the Board of Directors to function as endowments. As required by U.S. GAAP, net assets associated with endowment funds, including funds designated by the Board of Directors to function as endowments, are classified and reported based on the existence or absence of donor-imposed restrictions.

Interpretation of Relevant Law

The Association has interpreted the State of New Hampshire Uniform Prudent Management of Institutional Funds Act (the Act) as requiring the preservation of the contributed value of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, the Association classifies as net assets with perpetual donor restrictions (1) the original value of gifts donated to the permanent endowment, (2) the original value of subsequent gifts to the permanent endowment, and (3) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. If the donor-restricted endowment assets earn investment returns beyond the amount necessary to maintain the endowment assets' corpus value, the excess is available for appropriation and, therefore, classified as net assets with donor restrictions until appropriated by the Board of Directors for expenditure. Funds designated by the Board of Directors to function as endowments are classified as net assets without donor restrictions.

In accordance with the Act, the Association considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- (1) The duration and preservation of the fund
- (2) The purposes of the organization and the donor-restricted endowment fund
- (3) General economic conditions
- (4) The possible effect of inflation and deflation
- (5) The expected total return from income and the appreciation of investments
- (6) Other resources of the organization
- (7) The investment policies of the organization

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

Endowment Composition and Changes in Endowment

The endowment net assets composition by type of fund as of August 31, 2020 is as follows:

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Donor-restricted endowment funds	\$ -	\$ 1,832,172	\$ 1,832,172
Board-designated endowment funds	<u>6,285,094</u>	<u>-</u>	<u>6,285,094</u>
Total funds	<u>\$ 6,285,094</u>	<u>\$ 1,832,172</u>	<u>\$ 8,117,266</u>

The changes in endowment net assets for the year ended August 31, 2020 were as follows:

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Endowment net assets, August 31, 2019	\$ 5,598,461	\$ 1,670,289	\$ 7,268,750
Investment return			
Investment income	117,169	28,179	145,348
Net appreciation	<u>701,753</u>	<u>209,367</u>	<u>911,120</u>
Total investment return	818,922	237,546	1,056,468
Contributions	324,096	-	324,096
Withdrawals	(17,218)	-	(17,218)
Endowment assets appropriated for expenditure	<u>(439,167)</u>	<u>(75,663)</u>	<u>(514,830)</u>
Endowment net assets, August 31, 2020	<u>\$ 6,285,094</u>	<u>\$ 1,832,172</u>	<u>\$ 8,117,266</u>

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

The endowment net assets composition by type of fund as of August 31, 2019 was as follows:

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Donor-restricted endowment funds	\$ -	\$ 1,670,289	\$ 1,670,289
Board-designated endowment funds	<u>5,598,461</u>	<u>-</u>	<u>5,598,461</u>
Total funds	<u>\$ 5,598,461</u>	<u>\$ 1,670,289</u>	<u>\$ 7,268,750</u>

The changes in endowment net assets for the year ended August 31, 2019 were as follows:

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Endowment net assets, August 31, 2018	\$ 5,425,717	\$ 1,672,478	\$ 7,098,195
Investment return			
Investment income	110,250	34,439	144,689
Net appreciation	<u>118,308</u>	<u>36,469</u>	<u>154,777</u>
Total investment return	228,558	70,908	299,466
Contributions	446,715	-	446,715
Withdrawals	(40,268)	-	(40,268)
Endowment assets appropriated for expenditure	<u>(462,261)</u>	<u>(73,097)</u>	<u>(535,358)</u>
Endowment net assets, August 31, 2019	<u>\$ 5,598,461</u>	<u>\$ 1,670,289</u>	<u>\$ 7,268,750</u>

Return Objectives and Risk Parameters

The Association has adopted investment and spending policies for endowment assets that attempt to provide for equal treatment of present and future needs, with neither group favored at the expense of the other. To meet these objectives, the Board seeks to provide reasonably stable and predictable funds from the endowment for the Association's operating budget, to grow capital and to preserve and grow the real (inflation-adjusted) purchasing power of assets as indicated by the aggregate value of appreciation and income. The Association seeks to achieve an after cost total real rate of return, including investment income as well as capital appreciation, which exceeds that annual distribution with acceptable levels of risk.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

Strategies Employed for Achieving Objectives

To satisfy its long-term rate-of-return objectives, the Association relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Association targets an asset allocation strategy wherein assets are diversified among several asset classes. The pursuit of maximizing total return is tempered by the need to mitigate the volatility of returns and preserve capital. As such, the Association seeks broad diversification among assets having different characteristics with the intent to endure lower relative performance in strong markets in exchange for greater downside protection in weak markets.

Spending Policy

The Association's investment policy states that spendable investment income will be calculated as 5% of the average donor restricted endowment portfolio value based on the portfolio market value at the end of the most recent 12 quarters. Appropriations and withdrawals in excess of this policy must be approved by the Board of Trustees. Under this policy, the Association appropriated for distribution \$75,663 and \$73,097 for operating purposes for the years ended August 31, 2020 and 2019, respectively, which are included in nonoperating activities and transfers in the statement of activities and changes in net assets.

The Association has elected to transfer from the board-designated funds to the operating account annually an amount equal to the sum of (a) 70% of the average annual unrestricted bequest income plus gift annuity remainder from the previous five fiscal years, excluding the high and low years and (b) 6% of the average balance of the board-designated funds for the twelve quarters ending the previous fiscal year. Transfers may exceed the 70% with proper Board approval. Under this policy, the Association appropriated for distribution \$439,167 and \$462,261 for operating purposes for the years ended August 31, 2020 and 2019, respectively, which are included in nonoperating activities and transfers in the statement of activities and changes in net assets.

Funds with Deficiencies

Unless otherwise directed by the donor, the annual draw for operations from donor-restricted endowment funds shall be equal to 5% of the average balance of the donor-restricted funds for the twelve quarters ending December unless such draw would reduce the fund balance to an amount less than the historical value of the fund. In such cases, the Budget & Finance Committee shall recommend the amount of draw, if any, to the Board of Directors as part of the annual budget process. As of August 31, 2020 and 2019, there were no deficiencies of this nature associated with the donor-restricted endowment funds.

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

15. Net Assets with Donor Restrictions

Net assets with donor restrictions are available for the following purposes:

	<u>2020</u>	<u>2019</u>
Funds maintained subject to expenditure for a specified purpose:		
Manchester area senior women	\$ 36,411	\$ 26,225
Education, training and support to Greater Nashua	6,000	-
Early support services capacity building	-	25,000
Lives & Thrives program	-	88,531
To assist patients with glaucoma and glaucoma related research	-	433,855
Elderly in Manchester area	17,987	-
Support of volunteer client transportation	25,000	-
Contributions receivable - time restriction	98,842	236,317
Other	-	15,644
Net appreciation of net assets with perpetual restrictions to be used for general charitable purposes	<u>670,998</u>	<u>509,115</u>
Total funds maintained subject to expenditure for a specified purpose	<u>\$ 855,238</u>	<u>\$ 1,334,687</u>
Funds maintained held in perpetuity:		
Endowment funds		
Principal restricted, 5% maximum distribution	\$ 824,215	\$ 824,215
Principal restricted, greater of income or 6%	<u>336,959</u>	<u>336,959</u>
	1,161,174	1,161,174
Beneficial interest in perpetual trusts		
Fair value of investments held in trust by others	<u>1,970,418</u>	<u>1,813,259</u>
Total funds maintained in perpetuity	<u>\$ 3,131,592</u>	<u>\$ 2,974,433</u>
Total net assets with donor restrictions	<u>\$ 3,986,830</u>	<u>\$ 4,309,120</u>
Net assets released from restrictions consisted of the following:		
	<u>2020</u>	<u>2019</u>
Operating purposes or time restrictions accomplished	<u>\$ 874,920</u>	<u>\$ 465,656</u>

**NEW HAMPSHIRE ASSOCIATION FOR THE BLIND
d/b/a FUTURE IN SIGHT**

Notes to Financial Statements

**August 31, 2020
(with comparative totals for August 31, 2019)**

16. Uncertainty

On March 11, 2020, the World Health Organization declared coronavirus disease (COVID-19) a global pandemic. Local, U.S., and world governments encouraged self-isolation to curtail the spread of COVID-19 by mandating the temporary shut-down of business in many sectors and imposing limitations on travel and the size and duration of group gatherings. Most sectors are experiencing disruption to business operations and may feel further impacts related to delayed government reimbursement. The Coronavirus Preparedness and Response Supplemental Appropriations Act of 2020 provides several relief measures to allow flexibility to providers to deliver critical care. There is unprecedented uncertainty surrounding the duration of the pandemic, its potential economic ramifications, and additional government actions to mitigate them. Accordingly, while management expects this matter to impact operating results, the related financial impact and duration cannot be reasonably estimated.

The U.S. government has responded with three phases of relief legislation, as a response to the COVID-19 outbreak. Recent legislation was enacted into law on March 27, 2020, called the Coronavirus Aid, Relief, and Economic Security Act (CARES Act), a statute to address the economic impact of the COVID-19 outbreak. The CARES Act, among other things, 1) authorizes emergency loans to distressed businesses by establishing, and providing funding for, forgivable bridge loans, 2) provides additional funding for grants and technical assistance, and 3) delays due dates for employer payroll taxes and estimated tax payments for organizations. Management has evaluated the impact of the CARES Act on the Association, including its potential benefits and limitations that may result from additional funding that has been made available. During 2020, the Association obtained \$358,100 under the CARES Act Paycheck Protection Program (PPP). The PPP has specific criteria for eligibility and provides for forgiveness of the funds under this program if the Association meets certain requirements. Any portion of the funds that are not forgiven is to be repaid within 2 years at a 1% interest rate. As of August 31, 2020, the Association is reporting the PPP funds as CARES Act funding advance in the statement of financial position. On November 16, 2020, the Association received notice from the Small Business Administration that \$348,100 was forgiven and \$10,000 is required to be returned. The full amount of the PPP Funds will be recognized as grant revenue during 2021.



**FUTURE
IN SIGHT**

Board of Directors
FY2022

OFFICERS

Terms based on bylaws approved by Board of Directors July 29, 2021

David Hagen, Chair (1st Year 11.20; Term Exp. 2022)
[elected 9.20.2012]

[REDACTED]

Charlie Mathews, Treasurer (1st Year 11.2020, Re-elect 2021, Max Term Exp. 2026)
[elected 9.19.2017]

[REDACTED]

Steven Spain, Assistant Treasurer (1st year 11.20, Re-elect 2021, Max Term FY2027)
[elected 1.18.2018]

[REDACTED]

Dina Beaulieu, Secretary (1st year eff. 11.20, Re-elect 2021, Max Term FY2027)
[elected 11.29.2018]

[REDACTED]

Tim Murray, Immediate Past Chair (Eff. 11.19.20) (Max Term 11.2021)
[elected 5.17.2012]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

DIRECTORS

Dr. Kristen Bryant (Re-elect 2022. Max Term 2028)
[elected 11.21.2019]

[REDACTED]

David Kenepp (Re-elect 2023. Max Term FY 2029)
[elected 11.19.2020]

[REDACTED]

Jack Crisp (Re-elect 2022. Max Term FY 2028)
[elected 5.16.2019]

[REDACTED]

Ed Marsh (Re-elect 2023. Max Term FY2026)
[elected 9.19.2017]

[REDACTED]

Dr. Dorothy Hitchmoth (Re-elect 2022. Max Term FY 2028)
[elected 9.19.2019]

[REDACTED]

Judi Rogato (Re-elect 2021. Max Term FY2027)
[elected 11.29.2018]

[REDACTED]

Board Emeritus
Robert Cholette

[REDACTED]

William Sirak

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Staff Resumes of Key Personnel

Sarah Melasecca, Director of Adult Services
Beth Daisy, Direct Service Supervisors
Regina Mattrella, LICSW, Direct Service Supervisors
Jennifer Morgan, Case Management
Brienne Stone, Case Management
Michael Mulligan, Orientation & Mobility
Denise Caruso, Low Vision & Rehabilitation Services
Lydia DeWitt, Low Vision & Rehabilitation Services
Michelle Dowling, Low Vision & Rehabilitation Services
Nicholas Brigham, Low Vision & Rehabilitation Services
Sally Stevenson, Low Vision & Rehabilitation Services
Sarah Woodbury, Low Vision & Rehabilitation Services

SARAH B.E. MELASECCA

EDUCATION

2002 Franklin Pierce College
B.S., Business Management, graduated Summa Cum Laude

PROFESSIONAL EXPERIENCE

2020 – Present Future In Sight, Concord NH
Director of Adult Services

- Manage statewide Adult Services, including Social Work, Occupational Therapy and Volunteer Services as part of the Future In Sight Leadership Team.
- Supervise and evaluate Supervisor of Social Work and Supervisor of Occupational Therapy; lead program hiring and personnel management.
- Provide support and guidance for program service delivery teams, including caseload evaluation, thereby assuring the quality and consistency of service provision.
- Develop new programs and services as appropriate in response to community need; enhance existing programs in response to program evaluation.
- Seek funding and sponsorship opportunities; compose grant proposals as part of the Grants Committee; establish fee for service programs as appropriate.
- Ensure adherence to organizational and funder requirements; cultivate relationships with partners, vendors and funders.

2012 – 2020 Granite State Independent Living, Concord NH
Director of Independent Living Services

- Directed statewide Independent Living Services, Access Modification, Transportation, and Benefits Counseling programs including funding allocation and supervision of service provision.
- Supervised and evaluated Associate Director of Benefits Counseling, Independent Living Services Manager and Transportation Manager; responsible for program hiring and personnel management.
- Provided support and guidance for program service delivery teams, to assure quality and consistency of service provision.
- Sought funding and sponsorship opportunities; composed proposals for Federal and private sector grants; established fee for service programs as appropriate.
- Ensured compliance with organizational and funder requirements, including preparing reports for Federal and private sector grants.

2011 – 2012 Granite State Independent Living, Concord NH
Independent Living Services Program Manager

- Managed existing statewide Independent Living Services programs.
- Supervised and evaluated service delivery staff, assuring quality and consistency of service provision.
- Promoted use and awareness of GSIL services through outreach.
- Conducted program evaluation for measurable success, including consumer satisfaction surveys.
- Sought funding and sponsorship opportunities; composed proposals and reports for Federal and private grants.

2007 – 2011

Granite State Independent Living, Concord NH

Housing Program Manager

- Developed, coordinated and conducted consumer educational programs in Homeownership and Financial Fitness.
- Provided 1:1 credit counseling, rental counseling and group education for persons with disabilities.
- Managed Housing program, including staff supervision, reporting and program success analysis.
- Searched for funding opportunities; composed proposals for Federal and private sector grants.
- Conducted outreach and educational presentations to professional and consumer groups.
- Managed EasyLiving Home Program; coordinated Coalition meetings and events.

2004 – 2007

Laconia Area Community Land Trust, Laconia NH

Homeownership Director

- Managed Homeownership program, including reporting and program success analysis.
- Sought funding and sponsorship opportunities; composed proposals for Federal and private grants.
- Developed and coordinated educational programs for Homeownership and Financial Fitness.
- Provided one-on-one credit counseling and group education.
- Administered IDA Savings Program and related education and counseling.

2003 – 2004

New Hampshire Federal Credit Union, Concord NH

Mortgage Consultant/Consumer Loan Officer

- Managed daily functions of the mortgage department.
- Counseled and coached homebuyers through the mortgage process.
- Member of the Community Outreach Committee.

2002 – 2003

First Colebrook Bank, Concord NH

Branch Manager/Assistant Vice President

- Managed training, operations, and team development of customer service and teller staff.
- Increased customer base through business calling programs; maintained established customers through continuous quality service and planned customer appreciation events.
- Evaluated and approved consumer loans, including manufactured home and conventional mortgages.
- Maintained appearance and safety of branch facility and equipment through vendors and contractors.

1999 – 2002

First Colebrook Bank, Concord NH

Assistant Branch Manager/Assistant Vice President

- Evaluated and approved consumer and mortgage loans.
- Planned and implemented all facets of a limited-service branch at a retirement community.

PROFESSIONAL CERTIFICATIONS

- *Recovery Coach Academy, Connecticut Community For Addiction Recovery (2016)*
- *RENEW Facilitator Training Institute, UNH Institute on Disability/UCED (2016)*
- *Lean Yellow Belt Certification, NH Bureau of Education and Training (2015)*
- *Certified Aging-in-Place Specialist, National Association of Home Builders*

NeighborWorks America® Certifications:

- *Certificate of Professional Recognition in Homebuyer Education Training*
- *Certificate of Professional Recognition in Post Purchase Education Training*
- *Foreclosure Intervention and Default Counseling Certification*
- *Full-Cycle Lending Post Purchase Systems Certificate*
- *Homeownership Counseling Certification for Program Managers & Executive Directors*

Beth A. Daisy

EDUCATION

- Graduate Certificate in Assistive Technology University of New Hampshire, May 2019
- Master of Science, Occupational Therapy University of New Hampshire, Dec 2018
- Graduate Certificate, Aviation Safety Officer Naval Postgraduate School, June 2001
- Bachelor of Arts (With Distinction), Biological Sciences Cornell University, May 1997

PROFESSIONAL EXPERIENCE

FUTURE IN SIGHT, Concord, NH – Supervisor of Occupational Therapy Jan 2020 – Present

- Supervise 3 other occupational therapists and provide guidance and recommendations for occupational therapy practices and policies.
- Provide direct services by evaluating client needs, developing goals in conjunction with the client, designing treatment plans, teaching skills and techniques for participation in activities, and recommending and/or adapting specific equipment.
- Coordinate with providers and professionals and make referrals for other services to meet client needs.

NORTHEAST REHABILITATION HOSPITAL NETWORK, Salem, NH – Inpatient OT Jul 2019 – Sept 2020

- Developed and implemented appropriate plans of care and discharge goals based on thorough assessment incorporating all aspects of patient limitations and goals, and potential discharge environment.
- Engaged patients in meaningful, age appropriate, and goal directed activities and demonstrated creative problem solving as evidenced through numerous treatment approaches for each identified problem area.
- Provided training and education for patients, caregivers, and families on self-care activities, post-surgical precautions, use of durable medical equipment, assistive technology, compensatory techniques, home modifications, and home-exercise programs.

FIT TO GARDEN, Newmarket, NH – Program Developer/Occupational Therapist Aug 2018 - Present

- Developed a novel occupational therapy and assistive technology focused gardening program for community dwelling older adults implemented between Jan-May 2020. www.FitToGardenProgram.com
- Collaborated with UNH faculty, UNH Cooperative Extension, occupational therapists, master gardeners, and community stakeholders for needs assessment and curriculum development.

UNH DEPARTMENT OF OCCUPATIONAL THERAPY, Durham, NH – Adjunct Faculty Aug 2018 – May 2020

- For 3 semesters, supervised 13 UNH OT graduate students providing occupational therapy group interventions to older adults and stroke survivors.

AGING EXCELLENCE, Portsmouth, NH – Personal Support Specialist Aug 2018 – Jan 2020

- Provided personal care for adult clients to maintain independent living.

UNH INSTITUTE ON DISABILITY, Durham, NH – Assistive Technology Assistant Aug 2018 – Jan 2019

- Provided training to approximately 20 rehabilitation professionals as well as 20 students with cerebral palsy and their families as part of a full day workshop in Trivandrum, Kerala, India.
- Fabricated wheelchair modifications for 8 students with cerebral palsy.

KREMPELS CENTER, Portsmouth, NH – Level IIB Fieldwork Intern April 2018 - July 2018

- Facilitated 75 movement-based, cognitive, or creative expression groups for adults with brain injuries.
- Administered and interpreted assessments with clients including the Canadian Occupational Performance Measure (COPM), the Allen Cognitive Level Screen-5 (ACLS-5), and the Kitchen Task Assessment (KTA) to generate or modify client goals and match client with appropriate individualized treatment or groups.

WENTWORTH-DOUGLASS HOSPITAL, Dover, NH – Level IIA Fieldwork Intern Jan 2018 - Mar 2018

- Evaluated and treated approximately 360 patients on the acute care and post-surgical floors at a community hospital with emphasis on increasing patient's abilities with activities of daily living (ADLs).
- Administered and interpreted approximately a dozen standardized assessments with patients including the Mini Mental Status Exam (MMSE), the Montreal Cognitive Assessment (MoCA), and the Developmental Test of Visual Perception – Third Edition (DTVP-3) on 110 patients to develop treatment plans and goals.
- Monitored patient progress for up to 10 patients daily, making necessary modifications to the treatment plan as needed and providing discharge recommendations to appropriate services or recommending discharge when skilled occupational therapy services were no longer indicated.

AIR METHODS CORPORATION, Payson, UT - EMS Helicopter Pilot Sept 2007 - July 2015

- Safely transported over 300 patients to appropriate hospitals in accordance with all applicable Federal Aviation Regulations (FARs), policies, and company directives.
- As Lead Pilot at the Payson, UT helicopter base for the University of Utah's Air Med Program, managed requirements for 4 pilots, 1 mechanic, and 1 aircraft.
- Taught 4 safety classes to medical crews, and flight coordinators as part of annual crew member training

PAPILLON GRAND CANYON HELICOPTERS, Tusayan, AZ – Tour Helicopter Pilot Dec 2006 – Sept 2007

- Safely flew approximately 600 Grand Canyon tour flights in accordance with all applicable Federal Aviation Regulations (FARs), policies, and company directives.
- Provided 4 safety training lectures and in-flight bad weather recovery procedures training for fellow pilots.

UNITED STATES MARINE CORPS – Pilot, Safety Officer, & Recruiter (Reserves) Nov 2006 - Jun 2018
(Active) May 1997 - Nov 2006

- Managed a staff of 60 Marines throughout the year-long planning cycle and at a week-long leadership camp for 200 high school students as the Executive Officer of Summer Leadership and Character Development Academy 2016 and 2017.
- Devised, implemented, and monitored 18-month training plans for 48 pilots and crew chiefs to address squadron needs and individual abilities and goals.
- Conducted safety investigations including root cause analysis and provided training on safety for aircrews

PRESENTATIONS, AND PUBLICATIONS

Creating Low Cost Assistive Devices (presentation), Faculty and Student Development Workshop, Thirumala Devaswom Medical College, Alleppey, Kerala, India, Jan 14, 2019

Low Vision for the Generalist OT (webinar), NHOTA Annual Conference. Nov 10, 2020

Providing Client Centered Occupational Therapy for Veterans through Military Cultural Competency (presentation), NHOTA Special Interest Section, Portsmouth Regional, Hospital, Nov 5, 2018

Sexuality: The OT's role in addressing sexual functioning (presentation), UNH Department of Occupational Therapy, Guest Lecturer, Nov 2018 and Oct 2020

Treating Veterans with PTSD: When they are not being seen for PTSD (presentation), Wentworth-Douglass Hospital, OT In-Service Presentation, Mar 23, 2018

CERTIFICATIONS AND LICENSES

Occupational Therapist Registered OTR® Certification #418674, NBCOT

New Hampshire Occupational Therapist License #2880

Certified Aging in Place Specialist (CAPS), National Association of Home Builders and AOTA

Basic Life Support for Healthcare Providers

REGINA M. MATTRELLA, LICSW

CAREER SUMMARY

Licensed Independent Clinical Social Worker with extensive experience in the clinical and home setting. Demonstrated ability to work collaboratively with various agencies to ensure that organizational objectives are met and state licensing and accreditation standards are followed. Management experience leading innovative teams. Consistently recognized for developing strong and productive relationships with clients, families and clinicians.

PROFESSIONAL EXPERIENCE

FUTURE IN SIGHT, CONCORD, NH

Supervisor of Adult Services

2019-Present

Provide staff supervision to adult services professionals to promote team morale, ensure delivery of quality services and manage productivity.

- Participate in the development and implementation of client programs that promote the highest level of independence.
- Create a balance between completion of administrative tasks and the provision of direct services to clients.
- Provide education and training to various community service organizations regarding the services provided by Future In Sight.

Social Worker

2014-2019

Assist individuals that are visually impaired or legally blind to maintain the greatest level of independence and quality of life.

- Conduct assessments with clients to determine needs and develop individualized service plans to address all identified areas.
- Address the needs of the individual through collaboration with state agencies including Services for the Blind & Visually Impaired, Sight Services for Independent Living, Visiting Nurse Association and the Veterans Administration.
- Provide counseling services to individuals and family members impacted by vision loss.
- Advocate for the needs of clients and provide information on available resources in the community.

PLEASANT VIEW CENTER, CONCORD, NH

Director of Social Services

2013-2014

Served as a member of the interdisciplinary and management team of the center. Planned, developed, organized and directed the overall operation of the Social Services Department.

- Completed Psychosocial Assessments with each patient to identify social, emotional, psychological needs and strengths.
- Worked with patients, family members, and significant others to ensure an appropriate discharge plan was formulated.
- Collaborated with community resources and coordinated service delivery with providers such as VNA & Hospice, Durable Medical Providers, Meals on Wheels and mental health centers.
- Provided support and education to patients and their families regarding various issues including Advanced Directives, Dementia, Grief & Loss and Bereavement.

CASEY FAMILY SERVICES, CONCORD, NH

2009-2013

Supervisor/Team Leader

Served as a member of the Division management team, assisted in staff selection and participated in program development and budget management to achieve and maintain strategic goals of the agency.

- Planned and assigned work to staff within program area and monitored work to ensure timely achievement of work assignments.
- Ensured documentation and administrative assignments met all state licensing and accreditation standards.
- Provided weekly direct clinical case supervision with staff to ensure the highest quality of work and the best possible outcome for each case.

Social Worker

1999-2009

Worked collaboratively with the Division of Children, Youth and Families to identify, develop and maintain permanent foster or adoptive homes for children who experienced abuse or neglect.

- Developed, updated and monitored treatment plans for children and families in collaboration with members of the team in order to achieve optimal outcomes for permanency.
- Provided emergency crisis intervention that resulted in fewer psychiatric hospitalizations for children and adolescents served by the agency.
- Functioned as a liaison between Casey Family Services and other community-based organizations to facilitate collaboration and ultimately improve service delivery model.
- Provided counseling, support, advocacy and education to children and families that resulted in improved educational outcomes, comprehensive mental health services and greater stability in the family unit.

EDUCATION/MEMBERSHIP

MSW, University of New Hampshire, Durham, NH

Certificate, Advanced Clinical Supervision, Smith College, Northampton, MA

Member of the National Association of Social Workers since 1999

Member of the Northeast Association for Education & Rehabilitation since 2014

Jennifer Morgan

Focused, dedicated and compassionate professional with 22+ years of experience with a proven knowledge of case management. Extremely organized and enjoy working with a multidisciplinary team.

EXPERIENCE

Future In Sight, Concord, NH — *Case Worker/Case Manager*

March 2000 - PRESENT

- Working with adult and senior clients with dual sensory impairment (vision and hearing), serving on a multidisciplinary treatment team
- Assessing and referring clients for Low Vision Services, Assistive Technology Services, Vision Rehabilitation Services, Occupational Therapy, and Orientation and Mobility Instruction
- Working collaboratively with VA Medical Centers, VNA Agencies, Dept of Education/Vocational Rehabilitation, Medicaid CFI Program
- Assessing and training clients on accessible landline telephone equipment for the Governor's Commission on Disability/NH TEAP
- Overseeing peer facilitated, peer support groups and adaptive recreational programs
- Providing telephonic and face-to-face case management services and helping clients get connected to other community resources

EDUCATION

University Of
Massachusetts Lowell
Lowell, MA
Bachelor Of Arts (B.A.)
Psychology
Sociology
May 1998

Professional Development

Low Vision in Older
Adults: Foundations
of Rehabilitation

Lighthouse Guild

3/2020

Low Vision
Strategies: Guide to
Working with Low
Vision Clients

Allied Health Education

3/2020

CERTIFICATION

HIPAA 12/2020

The Moore Center, Manchester, NH — *Case Manager*
September 1998 - March 2000

- Worked with clients with developmental disabilities and dually diagnosed with mental health illness
- Conducted client assessments, developed client service plans, working with a multidisciplinary team
- Worked closely with state and city social service programs
- Provided case management services and parenting /life skills instruction

REFERENCES

Available upon request

PROFESSIONAL MEMBERSHIP

NE/AER

Association for Education
and Rehabilitation of the
Blind and Visually
Impaired

Brianne Stone

EXPERIENCE

- 2017-Present Future in Sight Concord, NH
Case Worker
- Meet with new clients and perform social work intakes.
 - Provide clients with case management services.
 - Facilitate peer support groups.
- 2015-2017 Southern NH University Manchester, NH
College for America Learning Coach
- Provided students with a primary and reliable point of contact, built relationships and coached students through onboarding, their education, program changes and graduation.
 - Guided students in planning a program path, setting and maintaining pace and developing a support network.
 - Directed students to resources within and outside the SNHU community.
- 2012-2015 Allenstown School District Allenstown, NH
Business Manager
- Created and managed multi-million dollar school budgets through collaboration with Principals, Teachers and SAU staff.
 - Managed school checking accounts, bank deposits, and reconciliations.
- 2007-2012 Pembroke Academy Pembroke, NH
Business Teacher
- Developed and implemented curriculum and lesson plans for students.
 - Taught a variety of classes including Personal Finance, Computer Applications, Business Math and Communications.
 - Counseled students with college and career planning.

EDUCATION

2003-2006 Southern New Hampshire University Manchester, NH
B.S., Business Education.

Michael P. Mulligan

PROFESSIONAL EXPERIENCE

FUTURE IN SIGHT, Concord, NH

Orientation and Mobility Specialist, Adult Services

May 2019-Present

- Develop and implemented short and long-term client goals
- Conduct comprehensive experiential-based mobility and vision assessments
- Provide adult community orientation and mobility services

THE CARROLL CENTER FOR THE BLIND, Newton, MA

Orientation and Mobility Specialist, Rehabilitation Services/Community Services Sep. 2018 – May 2019

- Effectively taught orientation and mobility services for on campus independent living rehabilitation program
- Developed and implemented short and long-term client goals
- Conducted comprehensive experiential-based mobility and vision assessments
- Provided adult community orientation and mobility services

THE CARROLL CENTER FOR THE BLIND, Newton, MA

Orientation and Mobility Specialist Intern, Community Services

May 2018 - Sep. 2018

- Provided community orientation and mobility services under the supervision of a certified orientation and mobility specialist
- Scheduled lessons directly with clients and kept a detailed instructor schedule
- Documented lesson notes in an online database for billing purposes

THE CARROLL CENTER FOR THE BLIND, Newton, MA

Community Services Administrative Assistant

Oct. 2017 - May 2018

- Maintained online client database
- Processed community referrals for orientation and mobility instruction
- Conducted end of the month billing reports and invoices

THE CARROLL CENTER FOR THE BLIND, Newton, MA

Job Coach/Employment Specialist

Feb. 2015 - Jan. 2018

- Assisted in launching a vocational internship program in conjunction with Cambridge Health Alliance and Massachusetts Commission for the Blind
- Developed and presented job preparedness curriculum to program interns several days per week
- Provided on the job coaching to assist clients with visual impairments learn their job duties
- Conducted job development with program interns leading to a 95% job placement rate
- Assessed clients need for accommodations and provided the necessary recommendations

BRAILLE INSTITUTE, Anaheim, CA

Activities Intern

Jun. 2011 - Dec. 2011

- Helped lead group exercise and fall prevention classes for individuals with visual impairments
- Performed fitness testing while documenting the results
- Lead group bowling classes once per week

THE CENTER FOR SUCCESSFUL AGING, Fullerton, CA
Fitness Intern

Aug. 2010 - Dec. 2010

- Assisted instructors in leading group exercise classes designed for older adults
- Helped develop an exercise program using the Nintendo Wii video game system
- Demonstrated proper techniques when performing different exercises
- Performed fitness testing while documenting the results

EDUCATION

University of Massachusetts Boston, Boston, MA
Vision Studies, M.Ed., track: Orientation & Mobility, December 2018 G.P.A 3.95

Faith Based Leadership and Outreach Training Program Anaheim, CA & Boston, MA
February 2012-December 2014

California State University Fullerton, Fullerton, CA
Kinesiology, B.S., focus area: Gerontology, December 2011

CERTIFICATIONS

Academy for Certification of Vision Rehabilitation & Education Professionals
Certified Orientation and Mobility Specialist, January 2019

VOLUNTEER EXPERIENCE

- Adaptive Sports New England, running club and wheelchair basketball (2017)
- Sunday school teacher (2015-Present)
- Assistant varsity basketball coach (2009)

DENISE CARUSO

PROFESSIONAL SUMMARY

History of being a capable, client focused professional promoting effective communication and service. Continually increasing knowledge in the low vision field in order to provide independence through technology, devices and training.

SKILLS

- Client assessment and analysis
- Working with clients with multiple disabilities (deaf/hard of hearing, mobility and cognitive disabilities)
- Organizational skills are emphasized for clients
- Low vision assessment with training
- iPhone/iPad education
- Report writing
- Self-motivated
- Microsoft office applications

WORK HISTORY

Low Vision & Rehabilitation Therapist, 09/2011 to Current

Future In Sight – Concord, NH

- Instruct clients in the efficient use of remaining vision with optical/ non-optical devices and assistive technology.
- Low vision assessment includes vision history, low vision history, eccentric viewing, contrast sensitivity testing and its functional effects, confrontational visual field testing and interpretation, amsler grid testing with distance and near acuity testing.
- Assessing needs based on secondary disabilities (deaf/hard of hearing, mobility and cognitive disabilities)
- Determination of appropriate aids and devices to reach client goals.
- Currently working with a national program (iCanConnect) that provides telecommunication equipment to eligible individuals with combined vision and hearing loss.

Independent Low Vision Consultant, 03/2001 to 09/2001

Self – Portland, ME

- Performed patient testing and low vision assessments for ophthalmologists and optometrists within their practice.

Ophthalmic Technician, 08/1987 to 11/1999

Eyesight Ophthalmic Services – Portsmouth, NH

- Measured and recorded visual acuity and color vision testing.
- Performed lensometry and sit-lamp examinations.
- Operated ophthalmic equipment for patient eye examinations and prepared patients for examinations and surgeries.
- Explained pre- and post-operative procedures to patients and carefully reviewed surgical plans.
- Instilled anesthetic drops and assisted in laser treatments and minor procedures.

Dispensing Optician, 02/1987 to 09/1987

Franklin Block Opticians – Portsmouth, NH

- Helped clients try on and select new frames and recommended lens options to meet specific needs.
- Completed facial measurements such as temple length, bridge size and vertex distance.
- Adjusted frames to fit patient faces by bending and shaping with hands, tools and heat.
- Prepared work orders outlining all specifications for new lenses and frames.

EDUCATION

Low Vision Training

The Lighthouse Guild - New York, NY

Coursework in low vision assessments and Vision Rehabilitation

Marketing

University of Pittsburgh - Greensburg, PA

Marketing

Westmoreland County Community College - Youngwood, PA

CERTIFICATIONS

Certified Ophthalmic Assistant (COA) through the Joint Commission of Allied Health

Personnel in Ophthalmology (JCAHPO)

Low Vision Certificate (JCAHPO)

Lydia DeWitt

Certifications & Licensure

- Nationally Board Certified and Registered Occupational Therapist (OTR)
- State of New Hampshire License # 2115
- American Heart Association Basic Life Saving for Healthcare Providers

Employment

- *Future In Sight, Concord, NH* *June 2017—Present*
 - Work with clients with varying degrees of vision loss to assess their functional performance in their home environments and help them function as independently as possible through the use of optical aids, adaptive equipment, technology, environmental modification, and teaching of compensatory strategies.
- *Dartmouth-Hitchcock Medical Center, Spine Center, Lebanon, NH* *Mar. 2010—Nov. 2019*
 - Work with a multidisciplinary team running an intensive, quota-based rehabilitation program that helps clients with chronic pain set and achieve functional goals in the areas of vocation, recreation and daily living. Also perform physical capacity evaluations; help assess clients' rehabilitation needs and manage clients' transition back to work
 - *Note: Transitioned from a full-time role to per diem in July 2015, concurrent with relocation to Rye*

Additional Clinical Experience

- *Fundația Broken Heart, Bucharest, Romania* *May 2009—Aug. 2009*
 - Cross-cultural experience in an array of practice settings, working with children with disabilities who lack access to therapeutic services. Provided direct, family-centered care for individual clients as well as consultation and training for other non-governmental organizations
- *Dartmouth-Hitchcock Medical Center, Inpatient Psychiatry, Lebanon, NH* *May 2008—Aug. 2008*
 - Worked as a member of an interdisciplinary team assisting with evaluation, treatment, and discharge planning for adults with acute mental illness. Led and co-led therapeutic groups using a cognitive behavioral approach

Education

- *Elizabethtown College, Elizabethtown, PA*
 - M.S. in Occupational Therapy, summa cum laude, August 2009
Thesis: *Exploring the Occupational Performance Needs of Women in a Homeless Shelter*
 - B.S. in Health and Occupation, summa cum laude, May 2008
Honors Thesis: *Occupational Justice in Action: Supporting Women Victimized by Human Trafficking and Forced Prostitution Worldwide*

Publications & Presentations

- Presented *Functional Restoration: Helping People Get Back on their Feet and Back to Work* at a meeting of the Case Management Society of New England in November 2011
- Presented Honors Thesis and Master's Thesis (*see Education section*) at the World Federation of Occupational Therapists Congress 2010 in Chile
- Presented Master's thesis at the Pennsylvania Occupational Therapy Association Annual Conference 2009

References and continuing education records provided upon request.

Michelle Dowling

OTR/L, CHT, LSVT, CYI

CONTACT



EDUCATION

Active enrolment for Clinical
Doctorates and Certification in
Low Vision OT
University of Alabama
Birmingham
2019-2021

Bachelor of Health Science
Occupational Therapy
University of New England /
Biddeford, ME
1987-1991

SKILLS

- Planning / Organization
- Strong Communication
- Leadership
- Troubleshooting
- Attention to Detail
- Time Management
- Compassion / Dedication
- Adaptability
- Public Speaking

PROFILE

Occupational therapist with 30 years of experience and hold several certifications in occupational therapy practice. Currently enrolled at the University of Alabama, Birmingham with expected graduation Summer 2021 with a clinical doctorate in occupational therapy as well as eligibility for certification in low vision rehabilitation. Current GPA is 4.0 with remaining coursework to include research on the effects of yoga for persons with low vision and low vision occupational therapy practice with patients with acquired brain injury.

EXPERIENCE

Hand Therapy Coordinator and Staff Occupational Therapist
February 2011 – present St Joseph Rehabilitation Nashua, NH

Hired to develop new Hand Therapy program for Occupational Therapy services working directly with the Orthopedic Doctors

- Assumed responsibility for two Outpatient clinics for St Joseph's Rehabilitation/Program Development; hired 5 CHTs for staffing clinics
- Received hospital wide Employee of the Month Award in December 2014 for outstanding patient care
- OT Student Programming
- Providing Seminars for the community on Common Hand and UE Injuries, sponsored by St Joseph's Hospital and Rehabilitation

MCPHS Adjunct Professor

Masters Level Occupational Therapy Department 2018-present

Future In Sight (formally the NH Association for the Blind)
Occupational Therapy Department 2019-present

Previous Staff Occupational Therapy Positions

Staff Occupational Therapist and Certified Hand Therapist

New Hampshire Hand Therapy Center 10/27/2009 to 02/2011

Bedford, New Hampshire

- Program development and organizational tasks
- Responsible scheduling hand surgeons for educational in-services
- Developed expanded website for NHHTC

Staff Occupational Therapist

Southern New Hampshire Rehabilitation Center, 10/2000 to 10/2009

Nashua, New Hampshire

- Program development, inventory management and documentation revision.
- Responsible for job sharing of clinical manager duties during LOA.
- Facilitates and participates in bi-weekly hand rounds with referring hand surgeons.
- Responsible for the Student Program

Michelle Dowling

OTR/L, CHT, LSVT, CYI

TECHNICAL SKILLS

- Certified Dry Needling
- Certified LSVT BIG
Parkinson's Care
- Certified Yoga
Instructor
- Pursuing certification
in Low Vision
Rehabilitation

COMMUNITY

BOARD MEMBER

Bridges
2016-2019

SPEAKER for Dinner with the Doctors Series

St. Joseph Hospital
2014-2016

HOBBIES & INTERESTS

- Family activities
- Yoga Instructor
- Outdoor life
- Entrepreneurship

EXPERIENCE

Clinical Manager of Occupational Therapy Department with 4 CHT's
Southern New Hampshire Rehabilitation Center, 2004

Nashua, New Hampshire

Clinical Management Duties

- * Facilitate monthly article reviews and In-services
- * Facilitate and schedule MD rounds
- * Facilitate documentation updating/ ensure quarterly chart reviews
- * JCAHO requirements
- * ID critical pathways to facilitate employee communication & pt satisfaction
- * Facilitate weekly OT staff meeting

Liberty Specialty Care Center; CT 1997-2000

Manchester Memorial Hospital Adolescence Behavioral Health: CT 1995-1998

Pain Management Center; CT 1993-1994

Brunswick Hospital; NY 1992-1993



JANE LYTTLE, PT
Physical Therapist

[REDACTED]
[REDACTED]



Alicia Brown
Physical Therapist

[REDACTED]
[REDACTED]



Carissa Torre
Physical Therapist

[REDACTED]
[REDACTED]



James Barrett
Physical Therapist

[REDACTED]
[REDACTED]

Michelle Dowling

OTR/L, CHT, LSVT, CYI

CONTACT



Hand Therapy Certification
Commission
1021100127
11/02/2002 - present

National Board for
Certification in
Occupational Therapy
982297
02/18/1992 - present

New Hampshire
Occupational Therapy
License #1408
09/13/2000 - present

Community Education

Virtual Yoga Class for Low Vision Clients at Future In Sight
March 2020

Small Business Owner: Hand Therapy Consultation Services, LLC
2003-2007
Continuing Education Company

New England Hand Society 35th Annual Meeting Presentation
December 7, 2007
Caring for the Elderly Shoulder December 2013

Common Hand Injuries of the Elbow, Wrist and Hand March 2014
Community Health Education Program sponsored by St Joseph
Hospital

Common Hand Injuries of the Upper Extremity October 2014
Dinner with the Doctors Program sponsored by St Joseph Hospital

How to Make an Apple Pie with Saddle Joint Arthritis October 2015
Presented at the NHOTA for 2.5 hours Concord, NH

Mount Washington College PTA program October 2015
Lecture on the Hand, Wrist and Elbow for 4 lecture hours

Managing Thumb Pain May 2016
Dinner with the Doctors Program sponsored by St Joseph Hospital

The Carpal Conundrum! October 2016
Presented at the NHOTA for 2.5 hours Concord, NH

The Fussy PIP Joint October 2016
Presented full day continuing education course for CHTs, OTRs

Nicolas Brigham MS OTR/L

Objective

- I am looking for opportunity to expand on my experience, in management and in home care, to really make a difference in individual lives through program development of therapy within their home environment.

Experience

OCCUPATIONAL THERAPIST | ENCOMPASS HOME HEALTH | DEC 2019 - PRESENT

- Manage my own OT caseload in home health in southern NH and the Merrimack Valley
- Maintain safe use of PPE during COVID pandemic going in and out of both facilities and homes
- Complete a productivity of 30 units per week
- Direct and treat an OT caseload utilizing COTAs

OCCUPATIONAL THERAPIST | CONTINUING CARE SOLUTIONS | JAN 2021 - PRESENT

- Perform wheelchair evaluations either in person or virtually
- Consult on adaptive equipment needs for individuals looking for varying mobility devices, splints, and other adaptive equipment.

DIRECTOR OF REHAB | GENESIS REHAB SERVICES | JUNE 2017 - DEC 2019

- Manage 8 therapists across two facilities one with 99 beds and the other around 30 beds
- Direct and treat an OT caseload utilizing COTAs
- Find solutions to anticipated and arising problems

OCCUPATIONAL THERAPIST & THERAPY COORDINATOR | AEGIS THERAPY | OCT 2016 - MARCH 2017

- Provide OT skilled services as needed
- Complete responsibility for the OT caseload at two buildings

OCCUPATIONAL THERAPIST PRN | GENESIS REHAB SERVICES | SEPT 2016 - JUNE 2017

- Provide OT skilled services as needed
- Have the flexibility to jump onto another therapist caseload and succeed
- Be 87% productive on a weekly basis.

CERTIFIED OCCUPATIONAL THERAPY ASSISTANT | GENESIS HEALTHCARE | MAR 2012 - SEPT 2016

CERTIFIED OCCUPATIONAL THERAPY ASSISTANT | KINDRED HEALTHCARE | SEPT 2011 - MAR 2012

Education

MS & BS | 2016 & 2014 | SALEM STATE UNIVERSITY

- MS: Occupational Therapy
- BS: Occupational Health Studies
- Level II Fieldwork: 40 per wk. for 12 wk. - Northeast Rehabilitation Hospital (sub-acute care unit) & Tewksbury State Hospital (inpatient mental health)

AS | 2011 | RIVER VALLEY COMMUNITY COLLEGE

- AS: Occupational Therapy Assistant
- Honors each semester attended
- Member of SOTA club

Licenses & Certifications

OCCUPATIONAL THERAPY LICENSES

- NH - #2592
- MA - # 12093

CERTIFICATIONS

- Current NBCOT certification - #364051
- CPR Certified
- Member of AOTA

Skills & Abilities

MANAGEMENT

- Being the only DOR and Occupational Therapist for two buildings provided a great amount of experience using system-oriented management to make sure everything runs smoothly
- Working as a COTA while going to school has not only given me an increased understanding of managing my time but a different perspective when working with and supervising other COTA's

FLEXIBILITY

- Home health requires flexibility in both your own schedule and the treatments you must provide as it can change the minute you walk in the door.
- Through working per diem I have gained the ability to walk into a situation and adapt as needed

COMMUNICATION

- It is easy for me to communicate with patients, supervisors, and other team members (nursing, therapist, assistants, etc.)
- Understanding of clinical documentation mixed with computer skills allows me to be proficient with communication through electronics as well

LEADERSHIP

- I am an Eagle Scout through the Boy Scouts of America

References

Available upon request

SALLY A. STEVENSON, MS, OTR/L, MPA

EDUCATION:

Master of Science in Occupational Therapy, Spalding University, August 2010
Pi Theta Epsilon, Occupational Therapy Honor Society, President's Award

Master of Public Administration, University of North Carolina at Chapel Hill, May 1994

Bachelor of Arts, Political Science and Sociology, University of Notre Dame, May 1992

OCCUPATIONAL THERAPY EXPERIENCE:

OT Works 4 Kidz, Windham, NH, April 2020 – present

Evaluated and treated pediatric patients with developmental and sensory deficits via Zoom and clinic sessions.
Provided parent/caregiver education on home exercise programs for children.

Associates in Pediatric Therapy, Louisville, KY & Clarksville, IN, May 2018 – November 2019 Evaluated and treated patients 14 months to 18 years old with disabilities including cerebral palsy, autism, ADHD, and other fine motor, visual motor, cognitive/behavioral, physical/postural, gross motor, motor planning, sensory processing and self-help ADL deficits.

Provided parent/caregiver education on home exercise programs for children.

Stevenson Wellness, PLLC, Louisville, KY, January 2015 - December 2018

Taught suicide prevention, treatment and management continuing education courses to healthcare professionals.

NeuroRestorative, Inc., Louisville, KY, August 2011- July 2013 and June 2014 – February 2018 Evaluated and treated patients with traumatic brain injuries and physical and mental comorbidities such as hemiparesis, paralysis, PTSD, substance abuse, depression, and anxiety, for current level of function in their homes and communities.

Developed and modified occupational therapy treatment plans based on patients' interests, skills and abilities for increased independence in meaningful occupations.

Provided patient and caregiver education on brain injuries, diseases, and resulting effects on function.

Supervised two certified occupational therapy assistants and nine occupational therapy students.

Life Care at Home, Aurora, CO, August 2013-April 2014

Evaluated and treated patients in their homes to increase independence with activities of daily living. Educated patients and caregivers on safe techniques to improve quality of life.

Developed home exercise programs as necessary and appropriate for each patient.

Maintained accurate and complete daily notes and progress reports.

Rehab Care, Clarksville & Sellersburg, IN and Louisville, KY, August 2010 – August 2011

Evaluated and treated patients in three transitional care rehabilitation facilities utilizing appropriate ADL retraining, therapeutic exercise, therapeutic activity, neuromuscular reeducation, wheelchair management, orthotic fitting, modality, and group treatment strategies to maximize patients' functional independence.

OCCUPATIONAL THERAPY FIELDWORK EXPERIENCE:

Baptist Hospital Northeast, Lagrange, KY, February – April 2010

Oaklawn Health and Rehabilitation Center, Louisville, KY, October – December 2009

MEMBERSHIPS & CIVIC ACTIVITIES:

- Member, American Occupational Therapy Association
- Past-Secretary, National Board of Pi Theta Epsilon, Occupational Therapy Honor Society
- Past-President, Beta Rho Chapter of Pi Theta Epsilon, Occupational Therapy Honor Society

Sarah Woodbury, MS, OTR/L

EDUCATION

University of New Hampshire - Durham, NH December 2019
Master of Science in Occupational Therapy GPA: 3.97

Gordon College – Wenham, MA May 2015
Bachelor of Science in Kinesiology; Minor in Psychology GPA: 3.95

- Graduated Summa Cum Laude

FIELDWORK EXPERIENCE

Wentworth Douglass Hospital Outpatient Rehab – Dover, NH April 2019 – July 2019
Level IIb Occupational Therapy (OT) Fieldwork Student

- Prepared and implemented OT interventions for approximately 30 adults with various neurological and orthopedic conditions in a hospital-based outpatient clinic using both biomechanical and compensatory approaches.
- Selected, administered, and interpreted evaluations and developed plans of care for more than 15 clients to assess and address functional abilities related to relevant daily occupations.
- Consulted with interdisciplinary team in clinic and at weekly meetings regarding integrating services for shared clients.
- Created an activities of daily living and instrumental activities of daily living fine motor board to be utilized by the occupational therapy department for evaluation and intervention purposes.

Chamberlain Street School – Rochester, NH January 2019 – April 2019
Level IIa Occupational Therapy (OT) Fieldwork Student

- Planned and provided push-in and pull-out OT services, for approximately 26 students with a variety of physical, cognitive, and psychosocial diagnoses, designed to increase students' independence with school-related activities.
- Assessed students' functional abilities related to school performance using evaluations; reported on evaluation findings to families and interprofessional team members at 2 Individualized Educational Program meetings.
- Partnered with supervisor by planning and presenting an hour-long workshop to para-educators on sensory regulation strategies to utilize with students enhancing school participation.

Bagdad Wood Senior Living – Durham, NH September 2018 – November 2018
Level Ib Occupational Therapy (OT) Fieldwork Student

- Designed, led, and documented weekly 12 resident group with a range of physical and cognitive abilities, utilizing movement activities and group discussions to promote health maintenance, leisure exploration, and social participation.
- Adapted movement activities according to individual abilities to support participation of each member.

Access Sports Medicine & Orthopaedics – Portsmouth, NH; Exeter, NH January 2018
Level Ia Occupational Therapy (OT) Fieldwork Student

- Observed direct-care therapy services to individuals with various orthopedic and nerve injuries of the upper extremity.
- Co-fabricated at least 3 orthopedic splints under close direction of supervising therapist to facilitate healing of patients' physical injuries and improve independent functional use of affected extremities.

RELATED EXPERIENCE

Fraser-Ford Child Development Center, Waban Projects – Sanford, ME July 2019 – February 2020
Education Technician III

- Provided individualized instruction in social, behavioral, emotional, functional, and academic skills within an Applied Behavior Analysis model to children with Autism Spectrum Disorder and other mental/behavioral health needs.
- Collaborated with special education teachers, occupational therapists, physical therapists, speech-language pathologists, and behavior analysts to deliver integrated services for children to optimize skill development.

Supportive Living, Inc. – Lexington, MA February 2015 – May 2015
Student Intern/Wellness Trainer

- Addressed functional and fitness goals using individual and group training for 6 adults with traumatic brain injuries.
- Transcribed and analyzed interviews for research exploring benefits of exercise for people with traumatic brain injuries.

CERTIFICATIONS

American Heart Association: Basic Life Support for Healthcare Providers Expires: September 2022
NH Physical Agent Modalities Certification Expires: December 2021

Key Personnel for Independent Living Part B Contract

<u>Name</u>	<u>Title</u>	<u>Contract Amount</u>
Sarah Melasecca	Director of Adult Services	0
Beth Daisy	Direct Service Supervisor	0
Regina Mattrella, LICSW	Direct Service Supervisor	0
Jennifer Morgan	Case Management	4,189
Brianne Stone	Case Management	4,629
Michael Mulligan	Orientation & Mobility	2,890
Denise Caruso	Low Vision & Rehabilitation Services	2,291
Lydia DeWitt	Low Vision & Rehabilitation Services	895
Michelle Dowling	Low Vision & Rehabilitation Services	1,869
Nicholas Brigham	Low Vision & Rehabilitation Services	3,305
Sally Stevenson	Low Vision & Rehabilitation Services	3,243
Sarah Woodbury	Low Vision & Rehabilitation Services	1,503
		24,813