

O-643-21

**NEIGHBORHOOD DEVELOPMENT FUND
Not-for-Profit Transmittal and Approval Form**

Applicant/Program: Friends of Beechwood Park Inc. Stone Entrance Steps
Applicant Requested Amount: \$12,105.00
Appropriation Request Amount: \$10,000.00

Executive Summary of Request
\$10,000 to Friends of Beechwood Park to fund stone entrance steps.

Is this program/project a fundraiser? Yes No
Is this applicant a faith based organization? Yes No
Does this application include funding for sub-grantee(s)? Yes No

I have reviewed the attached Neighborhood Development Fund Application and have found it complete and within Metro Council guidelines and request approval of funding in the following amount(s). I have read the organization's statement of public purpose to be furthered by the funds requested and I agree that the public purpose is legitimate. I have also completed the disclosure section below, if required.

8 District # Cassie Chambers Armstrong Primary Sponsor Signature \$10,000 Amount 11/22/2021 Date

Primary Sponsor Disclosure
List below any personal or business relationship you, your family or your legislative assistant have with this organization, its volunteers, its employees or members of its board of directors.

Approved by:

Appropriations Committee Chairman Date
Final Appropriations Amount: _____

Applicant/Program:

Friends of Beechwood Park Inc. Stone Entrance Steps

Additional Disclosure and Signatures

Additional Council Office Disclosure

List below any personal or business relationship you, your family or your legislative assistant have with this organization, its volunteers, its employees or members of its board of directors.

Council Member Signature and Amount

District 1	_____	\$ _____
District 2	_____	\$ _____
District 3	_____	\$ _____
District 4	_____	\$ _____
District 5	_____	\$ _____
District 6	_____	\$ _____
District 7	_____	\$ _____
District 8	_____	\$ _____
District 9	_____	\$ _____
District 10	_____	\$ _____
District 11	_____	\$ _____
District 12	_____	\$ _____
District 13	_____	\$ _____
District 14	_____	\$ _____
District 15	_____	\$ _____

Applicant/Program:

Friends of Beechwood Park Inc. Stone Entrance Steps

Additional Disclosure and Signatures

Additional Council Office Disclosure

List below any personal or business relationship you, your family or your legislative assistant have with this organization, its volunteers, its employees or members of its board of directors.

District 16 _____ \$ _____

District 17 _____ \$ _____

District 18 _____ \$ _____

District 19 _____ \$ _____

District 20 _____ \$ _____

District 21 _____ \$ _____

District 22 _____ \$ _____

District 23 _____ \$ _____

District 24 _____ \$ _____

District 25 _____ \$ _____

District 26 _____ \$ _____

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

Legal Name of Applicant Organization Friends of Beechwood Park, Inc.	
Program Name and Request Amount Stone Entrance Steps \$10,000 \$12,105	
	Yes/No/NA
Is the NDF Transmittal Sheet Signed by all Council Member(s) Appropriating Funding?	<input type="text" value="Yes"/>
Is the funding proposed by Council Member(s) less than or equal to the request amount?	<input type="text" value="Yes"/>
Is the proposed public purpose of the program viable and well-documented?	<input type="text" value="Yes"/>
Will all of the funding go to programs specific to Louisville/Jefferson County?	<input type="text" value="Yes"/>
Has Council or Staff relationship to the Agency been adequately disclosed on the cover sheet?	<input type="text" value="N/A"/>
Has prior Metro Funds committed/granted been disclosed?	<input type="text" value="N/A"/>
Is the application properly signed and dated by authorized signatory?	<input type="text" value="Yes"/>
Is proof of Tax Exempt status of 501(c) 3, 4, 6, 19, 1120-H included?	<input type="text" value="Yes"/>
If Metro funding is for a separate taxing district is the funding appropriated for a program outside the legal responsibility of that taxing district?	<input type="text" value="N/A"/>
Is the entity in good standing with: <ul style="list-style-type: none"> ▶ Kentucky Secretary of State? ▶ Louisville Metro Revenue Commission? ▶ Louisville Metro Government? ▶ Internal Revenue Service? ▶ Louisville Metro Human Relations Commission? 	<input type="text" value="Yes"/>
Is the current Fiscal Year Budget included?	<input type="text" value="Yes"/>
Is the entity's board member list (with term length/term limits) included?	<input type="text" value="Yes"/>
Is recommended funding less than 33% of total agency operating budget?	<input type="text" value="No"/>
Does the application budget reflect only the revenue and expenses of the project/program?	<input type="text" value="Yes"/>
Is the cost estimate(s) from proposed vendor (if request is for capital expense) included?	<input type="text" value="Yes"/>
Is the most recent annual audit (if required by organization) included?	<input type="text" value="N/A"/>
Is a copy of Signed Lease (if rent costs are requested) included?	<input type="text" value="N/A"/>
Is the Supplemental Questionnaire for churches/religious organizations (if requesting organization is faith-based) included?	<input type="text" value="N/A"/>
Are the Articles of Incorporation of the Agency included?	<input type="text" value="Yes"/>
Is the IRS Form W-9 included?	<input type="text" value="Yes"/>
Is the IRS Form 990 included?	<input type="text" value="Yes"/>
Are the evaluation forms (if program participants are given evaluation forms) included?	<input type="text" value="N/A"/>
Affirmative Action/Equal Employment Opportunity plan and/or policy statement included (if required to do so)?	<input type="text" value="N/A"/>
Has the Agency agreed to participate in the BBB Charity review program? If so, has the applicant met the BBB Charity Review Standards?	<input type="text" value="No"/>
Prepared by: Megan Metcalf	Date: November 19, 2021

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

SECTION 1 - APPLICANT INFORMATION

Legal Name of Applicant Organization:
(as listed on: <http://www.sos.ky.gov/business/records>) Friends of Beechwood Park, Inc.

Main Office Street & Mailing Address: 1643 Beechwood Ave., Louisville, KY 40204

Website: <https://beechwoodavepark.com/>

Applicant Contact:	Brian Caudill	Title:	President
Phone:	(502) 439-8030	Email:	brian.caudill@att.net
Financial Contact:	Patti Linn	Title:	Secretary/Treasurer
Phone:	(502) 341-4040	Email:	pgorlinn@gmail.com

Organization's Representative who attended NDF Training: Brian Caudill

GEOGRAPHICAL AREA(S) WHERE PROGRAM ACTIVITIES ARE (WILL BE) PROVIDED

Program Facility Location(s):	1620 Beechwood Ave., Louisville, KY		
Council District(s):	8	Zip Code(s):	40204

SECTION 2 - PROGRAM REQUEST & FINANCIAL INFORMATION

PROGRAM/PROJECT NAME: Beechwood Park Stone Entrance Steps

Total Request: (\$)	\$ 12,105.00	Total Metro Award (this program) in previous year: (\$)	\$ 0.00
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Purpose of Request (check all that apply):

- Operating Funds (generally cannot exceed 33% of agency's total operating budget)
- Programming/services/events for direct benefit to community or qualified individuals
- Capital Project of the organization (equipment, furnishing, building, etc)

The Following are Required Attachments:

<input checked="" type="checkbox"/> IRS Exempt Status Determination Letter	<input type="checkbox"/> Signed lease if rent costs are being requested
<input checked="" type="checkbox"/> Current year projected budget	<input checked="" type="checkbox"/> IRS Form W9
<input checked="" type="checkbox"/> Current financial statement	<input type="checkbox"/> Evaluation forms if used in the proposed program
<input checked="" type="checkbox"/> Most recent IRS Form 990 or 1120-H	<input type="checkbox"/> Annual audit (if required by organization)
<input checked="" type="checkbox"/> Articles of Incorporation (current & signed)	<input type="checkbox"/> Faith Based Organization Certification Form, if applicable
<input checked="" type="checkbox"/> Cost estimates from proposed vendor if request is for capital expense	

For the current fiscal year ending June 30, list all funds appropriated and/or received from Louisville Metro Government for this or any other program or expense, including funds received through Metro Federal Grants, from any department or Metro Council Appropriation (Neighborhood Development Funds). Attach additional sheet if necessary.

Source:	n/a	Amount: (\$)	\$ 0.00
Source:		Amount: (\$)	
Source:		Amount: (\$)	

Has the applicant contacted the BBB Charity Review for participation? Yes No

Has the applicant met the BBB Charity Review Standards? Yes No

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

SECTION 2 - AGENCY DETAILS

Describe Agency's Vision, Mission and Services:

The vision of the Friends of Beechwood Park is to develop Beechwood Park into a diverse new public gathering space that celebrates the site's past Victorian history while allowing it the flexibility to be a 21st-century park space that contributes to the health and well being of the neighborhood.

The mission of The Friends of Beechwood Park is to preserve green space, provide a quiet area for contemplative thought, and create recreational and educational opportunities for neighborhood residents.

As a public green space, we do not offer regularly scheduled programs or services with the exception of our annual street festival. The Highlands Shelby Park Library has used our park for activities and the park is available to Bloom Elementary School as an outdoor classroom and playground. Because we do not have a scheduling requirement nor is the park staffed, other groups and organizations may use the park without notifying us.

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

SECTION 4 - BOARD OF DIRECTORS AND PAID STAFF

Board Member	Term End Date
Brian Caudill, President	
Kristen Millwood, Vice President	
Patti Lynn, Treasurer	
Jo Shipley, Director	
Al Gorman, Director	
Becca Alvord, Director	
Corine Bordner, Director	

Describe the Board term limit policy:
 Board members are not term limited.

Three Highest Paid Staff Names	Annual Salary
We have no paid staff nor are board members paid.	

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

SECTION 5 - PROGRAM/PROJECT NARRATIVE

A: Describe the program/project start and end dates, a description of the program/project and applicable data with regards to specific client population the program will address (attach related flyers, planning minutes, designs, event permits, proposals for services/goods, etc.):

A report from The Trust for Public Land ranks Louisville's park system 84th out of the 100 largest cities in the country. According to its data, 33 percent of Louisville residents live within a 10-minute walk of a park, while the national average is 65 percent. Park usage in Jefferson County increased 174% due to COVID-19 during 2020 emphasizing the need for outdoor space.

Located in Louisville's Tyler Park neighborhood, Beechwood Park is a privately owned pocket park open to the public. The park meets the need for more green space within easy walking distance of a densely developed and heavily populated suburban area. The park consists of three distinct areas, each with a well-defined character and purpose designed to meet the needs of a diverse population.

Gresham Smith Landscape Architect's award winning design imagines the park in three major areas:

- Nature Play. An open children's area with tree swings and natural playground equipment such as rocks and finished tree stumps to climb on.
- Family Room. A gathering place using a footprint based on a Victorian home, with benches and arches that can serve as an outdoor classroom.
- Side Yard. A more serene garden-like setting featuring a pollinator garden and serving as a retreat for reading and contemplation.

B: Describe specifically how the funding will be spent including identification of funding to sub grantee(s):

Currently, the park has only one entrance, an ADA accessible ramp at the west side of the park near Baxter Avenue. This request will provide for a gateway entrance to the living room/outdoor classroom at the east end of the park near Bardstown Road, a major thoroughfare with heavy pedestrian traffic.

Three bids were solicited for the project with EZ Construction submitting the lowest bid at \$12,105.00. The bid provides for all labor, material and equipment to:

Mobilize to the site
Excavate as needed for step installation
Place stone base for leveling bed
Place approx. 6" thick limestone steps, 6' wide
Fabricate and install steel handrail painted black
Backfill edges of steps and grade around steps as necessary
Seed and straw all disturbed areas

Overall step width to be 6'. Each step will consist of a 4' wide step and a 2' wide step. Joints to alternate sides.

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

C: If this request is a fundraiser, please detail how the proceeds will be spent:

not applicable

D: For Expenditure Reimbursement Only – The grant award period begins with the Metro Council approval date and ends on June 30 of Metro fiscal year in which the grant is approved. If any part of this funding request is for funds to be spent before the grant award period, identify the applicable circumstances:

- The funding request is a reimbursement of the following expenditures that will probably be incurred after the application date, but prior to the execution of the grant agreement:
- ✓ If selecting this option, the invoice, receipt and payment documentation should not be available as of the date of this application.

The Grantee will be required to submit financial reporting in accordance with the reporting schedule provided in the grant agreement.

- Reimbursements should not be made before application date unless an emergency can be demonstrated by the primary council sponsor. The funding request is a reimbursement of the following expenditures (attach invoices or proof of payment):
- ✓ Attach a copy of invoices and/or receipts to provide proof of purchase of activities associated with the work plan identified in this application.
 - ✓ Attach a copy of cancelled checks to provide proof of payment of the invoices or receipts associated with the work plan identified in this application.

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

E: Describe the program's benefits to those being served (measurable outcomes). Include the program's process for collecting data and the indicators that will be tracked to measure the benefits to those being served:

As a public green space, we do not offer regularly scheduled programs with the exception of our annual street festival. The Highlands Shelby Park Library has used our park for activities and story board walks. The park is available to Bloom Elementary School as an outdoor classroom and playground. Because we do not have a scheduling requirement, other groups and organizations may use the park without notifying us.

Our annual street festival program is designed to increase awareness of the park and its unique features. The free event offers live music by local musicians and entertainment by local performers such as the Squallis Puppeteers, a collective of local artists and performers who use puppetry to tell the stories that are important to our community. Art programs and games for children are offered. Due to COVID-19, we were unable to hold our street festival and other community activities in 2020. Beechwood Park participated in Cyclouvia 2021 by hosting a live music venue.

The park offers a large chalk board wall where neighbors and children can freely express themselves year round through chalk art. In 2020, our neighbors and guests used the chalk board wall to express their views on social justice and the COVID pandemic. We are exploring future programming options such as neighborhood movie nights.

As our park is a private park open to the public, we do not monitor nor limit entry. We do not have a method to determine income levels, race/ethnicity, or age for park users as the park is not staffed. We welcome users regardless of race/ethnicity, income or age, asking only that users respect the park. We do anticipate frequent usage by nearby Bloom Elementary School and its approximate 550 students.

F: Briefly describe any existing collaborative relationships the organization has with other community organizations. Describe what those partners are bringing to the relationship in general and to this program/project specifically.

The Friends of Beechwood Park started the design process with a neighborhood charette to solicit input from stakeholders. We then met with landscape architect firm Gresham Smith whose design for Beechwood Park was honored with a Merit Award of Achievement for Communication from the American Society of Landscape Architects-Kentucky Chapter. Claude Stephens, Director, Children at Play Network and Facilitator of Outreach and Regenerative Design at Bernheim Forest, has assisted with the nature play area design.

We are working with the Highlands-Shelby Park Library and Bloom Elementary to offer an outdoor venue for various educational and recreational opportunities that are otherwise unavailable due to the urban nature of the surrounding area. Prior to the pandemic, Bloom students would walk to Tyler Park, a 10+ minute walk along city streets, for field trips and outdoor play opportunities. Upon completion of the nature play area, Beechwood Park will offer similar amenities as Tyler Park but at a much more convenient location.

The recently completed pollinator garden and phase 2 living room/outdoor classroom offer a unique learning environment for both Bloom Elementary School and the Highlands Shelby Park Library. Beechwood Park hosted library educational programs, including science projects, that needed an outdoor venue. During the pandemic, the Library used Beechwood Park as a site for storyboard books that allow young children and parents to stroll through the park while reading children's books.

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

SECTION 6 - PROGRAM/PROJECT BUDGET SUMMARY

THE PROGRAM/PROJECT BUDGET SHOULD REALISTICALLY ESTIMATE WHAT AMOUNT IS NEEDED FROM METRO GOVERNMENT AND WHAT IS EXPECTED FROM OTHER SOURCES.

Program/Project Expenses	Column 1	Column 2	Column (1+2)=3
	Proposed Metro Funds	Non- Metro Funds	Total Funds
A: Personnel Costs Including Benefits			\$ 0.00
B: Rent/Utilities			\$ 0.00
C: Office Supplies			\$ 0.00
D: Telephone			\$ 0.00
E: In-town Travel			\$ 0.00
F: Client Assistance (See Detailed List on Page 8)			\$ 0.00
G: Professional Service Contracts			\$ 0.00
H: Program Materials			\$ 0.00
I: Community Events & Festivals (See Detailed List on Page 8)			\$ 0.00
J: Machinery & Equipment			\$ 0.00
K: Capital Project	\$ 12,105.00		\$ 12,105.00
L: Other Expenses (See Detailed List on Page 8)			\$ 0.00
*TOTAL PROGRAM/PROJECT FUNDS	\$ 12,105.00	\$ 0.00	\$ 12,105.00
% of Program Budget	100.00%	0.00%	100%

List funding sources for total program/project costs in Column 2, Non-Metro Funds:

Other State, Federal or Local Government	
United Way	
Private Contributions (do not include individual donor names)	
Fees Collected from Program Participants	
Other (please specify)	
Total Revenue for Columns 2 Expenses **	\$ 0.00

*Total of Column 1 MUST match *Total Request on Page 1, Section 2*

**Must equal or exceed total in column 2.

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

Detail for Client Assistance, Community Events & Festivals or Other Expenses shown on Page 7 (circle one and use multiple sheets if necessary)	Column 1	Column 2	Column (1 + 2)=3
	Proposed Metro Funds	Non-Metro Funds	Total Funds
not applicable			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
Total	\$ 0.00	\$ 0.00	\$ 0.00

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

Detail of In-Kind Contributions for this PROGRAM only: Includes Volunteers, Space, Utilities, etc. (Include anything not bought with cash revenues of the agency).

Donor / Type of Contribution	Value of Contribution	Method of Valuation
<p align="center"><i>Total Value of In-Kind (to match Program Budget Line Item. Volunteer Contribution & Other In Kind)</i></p>	<p align="center">\$ 0.00</p>	

*** DONOR INFORMATION REFERS TO WHO MADE THE IN KIND CONTRIBUTION. VOLUNTEERS NEED NOT BE LISTED INDIVIDUALLY, BUT GROUPED TOGETHER ON ONE LINE AS A TOTAL NOTING HOW MANY HOURS PER PERSON PER WEEK**

Agency Fiscal Year Start Date: January 1, 2021

Does your Agency anticipate a significant increase or decrease in your budget from the current fiscal year to the budget projected for next fiscal year? NO YES

If YES, please explain:

LOUISVILLE METRO COUNCIL NEIGHBORHOOD DEVELOPMENT FUND APPLICATION

SECTION 7 - CERTIFICATIONS & ASSURANCES

By signing Section 7 of the Grant Application, the authorized official signing for the applicant organization certifies and assures to the best of his or her knowledge and/or belief the following Assurances and Certifications. If there is any reason why one or more of the assurances or certifications listed cannot be certified or assured, please explain in writing and attach to this application.

Standard Assurances

1. Applicant understands this application and its attachments as well as any resulting grant agreement, reports and proof of expenditure is subject to Kentucky's open records law.
2. Applicant understands if the grant agreement is not returned to Louisville Metro within 90 days of its mailing to the applicant, the approval is automatically revoked and the funds will not be disbursed to our organization.
3. Applicant and any sub grantee will give Louisville Metro Government access to and the right to examine all paper or electronic records related to the awarded grant for up to five years of the grant agreement date.
4. Applicant assures compliance with the grant requirements and will monitor the performance of any third party (sub-grantee).
5. The Agency is in good standing with the Kentucky Secretary of State, Louisville Metro Government, the Jefferson County Revenue Commission, the Internal Revenue Service, and the Louisville Metro Human Relations Commission.
6. Applicant understands failure to provide the services, programs, or projects included in the agreement will result in funds being withheld or requested to be returned if previously disbursed.
7. Applicant understands they must return to Louisville Metro any unexpended funds by July 31 following the Metro Louisville's fiscal year end.
8. Applicant understands they must provide proof of all expenditures (canceled checks, receipts, paid invoices). The Applicant understands the failure to provide proof of expenditures as required in the grant agreement could result in funding being withheld or request to be returned if previously disbursed.
9. Applicant understands if this application is approved, the grant agreement will identify an award period that begins with the Metro Council approval date, and will end with June 30 of the fiscal year in which the grant is approved. Expenditures associated with this award expected to occur prior to the award period (approval date) must be disclosed in this application in order to be considered compliant with the grant agreement.
10. Applicant understands if we choose to incur expenditures prior to the approval of the application by the Metro Council, there is no guarantee that funding will be reimbursed, as the Council may choose not to award the application.
11. Applicant will establish safeguards to prohibit employees or any person that receives compensation from awarded funds from using their position for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.

Standard Certifications

1. The Agency certifies it will not use Louisville Metro Government funds for any religious, political or fraternal Activities.
2. The Agency has a written Affirmative Action/Equal Opportunity Policy.
3. The Agency does not discriminate in employment or in provision of any service/program/activity/event based on age, color, disabled status, national origin, race, religion, sex, gender identity or sexual orientation, or Vietnam era veteran status.
4. The Agency certifies it will not require clients, recipients, or beneficiaries to participate in religious, political, fraternal or like activities in order to receive services/benefits provided with Louisville Metro Government funds.
5. The Agency understands the Americans with Disabilities Act (ADA) and makes reasonable accommodations.

Relationship Disclosure: List below any relationship you or any member of your Board of Directors or employees has with any Councilperson, Councilperson's family, Councilperson's staff or any Louisville Metro Government employee.

SECTION 8 - CERTIFICATIONS & ASSURANCES

I certify under the penalty of law the information in this application (including, without limitation, "Certifications and Assurances") is accurate to the best of my knowledge. I am aware my organization will not be eligible for funding if investigation at any time shows falsification. If falsification is shown after funding has been approved, any allocations already received and expended are subject to be repaid. I further certify that I am legally authorized to sign this application for the applying organization and have initialed each page of the application.

Signature of Legal Signatory:	<i>Brian Caudill</i>	Date:	11/03/2021
Legal Signatory: (please print):	Brian Caudill	Title:	President
Phone:	(502) 439-8030	Extension:	
Email:	brian.caudill@att.net		



Louisville Metro Government
Office of Management and Budget

Neighborhood Development Fund Training Attestation

Grantee Organization Name: FRIENDS OF BEECHWOOD PARK

Grantee Representative Name: BRIAN CAHOIL

I agree that I am an authorized representative and/or signatory of the organization named above and attest to having viewed the Neighborhood Development Fund training presentation. I understand the reporting requirements of the Neighborhood Development Fund grant. Additionally, after viewing the presentation, I have correctly answered the below questions.

Please check:



I viewed the NDF training material on the website

Answer the following questions before signing (Circle or write in the correct answer).

1. The NDF funding your agency received is a gift from LMG? True or False
2. Name the three budget categories that require a detail list.
CLIENT ASSISTANCE, COMMUNITY EVENTS and OTHER EXP
3. If your agency charged gross pay to NDF, you are required to provide additional documentation to satisfy reporting requirements. True or False
4. Which four questions should your financial support documentation answer at all times?
WHO MADE PURCHASE ORG, WHAT WAS PURCHASED, WHEN PURCHASE WAS MADE, and WHEN PURCHASE MADE
5. Your agency is considered noncompliant if you do not account for funds received and/or your financial report is missing support documentation? True or False
6. Canceled check, bank statement, invoice and receipt are considered proof of payment. True or False.

[Signature]
Grantee Representative Signature

11/3/21
Date

NOTE: Please return to Roxanne Steele

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: MAR 19 2015

FRIENDS OF BEECHWOOD PARK
1647 BEECHWOOD AVENUE
LOUISVILLE, KY 40204-0000

Employer Identification Number:
47-2692437
DLN:
26053476001265
Contact Person:
CUSTOMER SERVICE ID# 31954
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
January 23, 2015
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Letter 5436

FRIENDS OF HEBBWOOD PARK

Sincerely,

Tamara Rippanda

Director, Ecopri Organizations

Letter #436

Friends of Beechwood Park 2021 Budget

Fiscal Year 2021 Organizational Operating Budget
January 1, 2021--December 31, 2021

Expenses	
Printing and Reproduction	200
Insurance (directors & officers)	950
Insurance (liability)	1,300
Supplies (office & field)	75
Advertising & Marketing	50
Bank Fees & Payroll Processing Fees	0
Postage	100
Maintenance (mowing)	2,000
Property Tax	1,600
Park Signage	1,200
Total Expenses	\$7,475
Revenue	
Individual Contributions (memberships, annual appeal, memorial gifts)	\$5,200
Corporate Contributions	
Foundation Grants	1,000
Government Grants	250
Events*	0
Merchandise Sales	100
Total Revenue	\$6,550

* Due to the COVID-19 Pandemic, we may not be able to hold our annual Street Festival which nets approximately \$900-\$1100.

Beechwood Park
Profit Loss Statement 2020

INCOME

Fundraising-Events	\$0
Fundraising: Give for Good Donation	3,822
Fundraising - Annual Appeal	
Donations - Individuals	\$1,225.00
Interest Income - Checking	\$0.00
Grants - Below \$5,000	0
Grants - Above \$5000	\$5,047
TOTAL INCOME	

EXPENSES

Bank Charges	
Event Costs	0
Direct Mail	
Insurance/Directors & Officers	918
Insurance - Liability	
Legal & Professional Fees	\$1,216
Licenses and Fees	0
Maintenance & Repair	
Computer/IT	1,625
Office Supplies	
Postage	
Printing & Copies	
Subscriptions and Dues	
Property Taxes	\$1,454
Telephone	
Travel	
Utilities	
TOTAL EXPENSES	5,213

NET INCOME / (LOSS)

-166

BEECHWOOD PARK BALANCE SHEET
December 31, 2020

CURRENT ASSETS	WITHOUT DONOR RESTRICTIONS*	WITH DONOR RESTRICTIONS	TOTAL
Cash	\$4,483.65		\$4,483.65
Marketable securities			\$0.00
Accounts receivable			\$0.00
Prepaid expenses			\$0.00
TOTAL CURRENT ASSETS			\$4,483.65
FIXED ASSETS			
ADA Entrance Ramp	\$13,222.00		\$13,222.00
Park Benches	\$5,277.00		\$5,277.00
TOTAL FIXED ASSETS	\$18,499.00		\$18,499.00
TOTAL ASSETS			\$22,982.65
CURRENT LIABILITIES			
Accounts Payable			\$0.00
TOTAL CURRENT LIABILITIES			\$0.00
FUND BALANCE			\$22,982.65
FUND BALANCE			\$0.00
TOTAL FUND BALANCE			\$0.00
TOTAL LIABILITIES AND FUND BALANCE			\$22,982.65

*Friends of Beechwood Park has no restricted donor funds

[HELP](#)[MENU](#)

[Home](#) > [Tax Exempt Organization Search](#) > [Friends Of Beechwood Park](#)

[< Back to Search Results](#)

Friends Of Beechwood Park

EIN: 47-2692437 | Louisville, KY, United States

Determination Letter

A favorable determination letter is issued by the IRS if an organization meets the requirements for tax-exempt status under the Code section the organization applied.

> Final Letters

- [FinalLetter 47-2692437 FRIENDSOFBEECHWOODPARK 03132015.tif](#)

Publication 78 Data

Organizations eligible to receive tax-deductible charitable contributions. Users may rely on this list in determining deductibility of their contributions.

On Publication 78 Data List: Yes

Deductibility Code: PC

Form 990-N (e-Postcard)

Organizations who have filed a 990-N (e-Postcard) annual electronic notice. Most small organizations that receive less than \$50,000 fall into this category.

> Tax Year 2020 Form 990-N (e-Postcard)

Tax Period:

2020 (01/01/2020 - 12/31/2020)

EIN:

47-2692437

Legal Name (Doing Business as):

Friends Of Beechwood Park

Mailing Address:

1643 Beechwood Avenue
Louisville, KY 40204

United States

Principal Officer's Name and Address:

Patti Linn

1643 Beechwood Avenue
Louisville, KY 40204
United States

Gross receipts not greater than:
\$50,000

Organization has terminated:
No

Website URL:

> **Tax Year 2019 Form 990-N (e-Postcard)**

Tax Period:
2019 (01/01/2019 - 12/31/2019)

EIN:
47-2692437

Legal Name (Doing Business as):
Friends Of Beechwood Park

Mailing Address:
1647 Beechwood Avenue
Louisville, KY 40204
United States

Principal Officer's Name and Address:
Brian Caudill

1647 Beechwood Avenue
Louisville, KY 40204
United States

Gross receipts not greater than:
\$50,000

Organization has terminated:
No

Website URL:
beechwoodavepark.com

> **Tax Year 2018 Form 990-N (e-Postcard)**

Tax Period:
2018 (01/01/2018 - 12/31/2018)

EIN:
47-2692437

Legal Name (Doing Business as):
Friends Of Beechwood Park

Mailing Address:
1647 Beechwood Avenue
Louisville, KY 40204
United States

Principal Officer's Name and Address:
Brian Caudill

1647 Beechwood Avenue
Louisville, KY 40204
United States

Gross receipts not greater than:
\$50,000

Organization has terminated:
No

Website URL:
beechwoodavepark.com

> **Tax Year 2017 Form 990-N (e-Postcard)**

Tax Period:
2017 (01/01/2017 - 12/31/2017)

EIN:
47-2692437

Legal Name (Doing Business as):
Friends Of Beechwood Park

Mailing Address:
1647 Beechwood Avenue
Louisville, KY 40204
United States

Principal Officer's Name and Address:
Brian Caudill

1647 Beechwood Avenue
Louisville, KY 40204
United States

Gross receipts not greater than:
\$50,000

Organization has terminated:
No

Website URL:
beechwoodavepark.com

> **Tax Year 2016 Form 990-N (e-Postcard)**

Tax Period:
2016 (01/01/2016 - 12/31/2016)

EIN:
47-2692437

Legal Name (Doing Business as):
Friends Of Beechwood Park

Mailing Address:
1647 Beechwood Avenue
Louisville, KY 40204
United States

Principal Officer's Name and Address:
Brian Caudill

1647 Beechwood Avenue
Louisville, KY 40204
United States

Gross receipts not greater than:
\$50,000

Organization has terminated:
No

Website URL:

0908333.09

amcray
ADD

Alison Lundergan Grimes
Kentucky Secretary of State
Received and Filed:
1/23/2015 1:04 PM
Fee Receipt: \$8.00

**ARTICLES OF INCORPORATION
OF
FRIENDS OF BEECHWOOD PARK, INC.**

Pursuant to the provisions of KRS 273.247, the undersigned Corporation hereby executes these Articles of Incorporation:

ARTICLE I - Name

The name of this corporation shall be Friends of Beechwood Park, Inc. (the "Corporation").

ARTICLE II - Purpose

(A) The Corporation is organized and operated exclusively for charitable, religious, educational, and scientific purposes under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and under Chapter 273 of the Kentucky Revised Statutes. The Corporation will receive gifts, contributions and grants from individuals, private organizations, public sources, and any agency of any municipal or state government or of the United States of America, and will apply, pay over, and disburse those gifts, contributions, and grants or their proceeds in furtherance of the specific and primary purposes of this corporation.

(B) The Corporation may exercise any and all powers possessed by nonstock, nonprofit corporations formed under Chapter 273 of the Kentucky Revised Statutes except that the corporation may not engage in activities that are impermissible for: (a) a corporation exempt from federal income tax under Section 501(c)(3) of the Code; or (b) a corporation, contributions to which are deductible under Section 170(e)(2) of the Code. To amplify but not to limit the foregoing, no substantial part of the activities of the Corporation may consist of engaging in

propaganda, or otherwise attempting to influence legislation, and the corporation may not participate or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. No part of the net earnings of the Corporation may inure to the benefit of, or be distributable to, any director, officer or employee of the corporation or any other individual, except that reasonable compensation may be paid for services rendered to or for the Corporation in connection with one or more of its purposes.

(C) In furtherance of the general purposes stated in Paragraphs (A)-(B), the particular purpose of the Corporation is to develop, maintain, and upkeep a public park on Beechwood Avenue in Louisville, Kentucky.

ARTICLE III – Principal Office, Registered Office and Registered Agent

(A) The address of the Corporation's principal office shall be 1647 Beechwood Avenue, Louisville, Kentucky 40204.

(B) The address of the initial registered office of the Corporation is 1647 Beechwood Avenue, Louisville, Kentucky 40204, and the name of the initial registered agent at such address is Brian L. Caudill.

ARTICLE IV - Directors

(A) The manner in which directors shall be chosen and removed from office, their qualifications, powers, duties, compensation, if any, tenure of office, the manner of filling vacancies on the Board, and the manner of calling and holding meetings of the board of directors, shall be stated in the By-Laws.

(B) The number of initial directors of the Corporation shall be thirteen.

(C) The names and addresses of the initial Board of Directors who shall serve until their successors are duly elected and qualified are as follows:

Brian Caudill
1647 Beechwood Avenue
Louisville, Kentucky 40204

Amber Cann
1651 Beechwood Avenue
Louisville, Kentucky 40204

Kristen Millwood
1612 Beechwood Avenue
Louisville, Kentucky 40204

Kathey Schickli
1639 Tyler Parkway
Louisville, Kentucky 40204

Dawn Sandquist
1656 Beechwood Avenue
Louisville, Kentucky 40204

Gloria Cheever
1623 Beechwood Avenue, Apt 3
Louisville, Kentucky 40204

Ian Luyk
1629 Beechwood Avenue
Louisville, Kentucky 40204

Candice Luyk
1629 Beechwood Avenue
Louisville, Kentucky 40204

Brian Elstner
1613 Beechwood Avenue
Louisville, Kentucky 40204

Catherine Elstner
1613 Beechwood Avenue
Louisville, Kentucky 40204

Patti Linn
1643 Beechwood Avenue
Louisville, Kentucky 40204

Al Gorman
1643 Beechwood Avenue
Louisville, Kentucky 40204

Charlotte Whitty
1639 Beechwood Avenue
Louisville, Kentucky 40204

ARTICLE V - Incorporator


The name and mailing address of the incorporator are: Brian L. Caudill, 1647 Beechwood Avenue, Louisville, KY 40204.

ARTICLE VI - Dissolution

Upon the dissolution of the Corporation, any remaining assets of the corporation must be distributed to one or more exempt organizations under Section 501(c)(3) of the Code or to the federal, state, or local government for a public purpose. Any assets not so disposed of will be disposed of by a court of competent jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purpose or to organization(s) that are organized and operated exclusively for such purpose.

IN WITNESS WHEREOF, the undersigned, being the person named above as the incorporator, has executed these Articles of Incorporation the 13th day of January, 2015.

BRIAN CAUDILL, as Incorporator

By: 
Brian Caudill

Jo Shipley

From: "Tim Dues" <timdues@ezconst.com>
Date: Thursday, January 14, 2021 9:05 AM
To: "Jo Shipley" <jo_shipley@bellsouth.net>; "Brian Caudill" <brian.caudill@att.net>
Subject: RE: Beechwood Park

See updated price below:

Price to install steps at Beechwood Park is \$12,105.00
Labor - \$5,340.00
Material (Including handrail) - \$6,765.00

Provides for all labor, material and equipment to:

- Mobilize to the site
- Excavate as needed for step installation
- Place stone base for leveling bed
- Place approx. 6" thick limestone steps, 6' wide
- Fabricate and install steel handrail painted black
- Backfill edges of steps and grade around steps as necessary
- Seed and straw all disturbed areas

Overall step width to be 6'. Each step will consist of a 4' wide step and a 2' wide step. Joints to alternate sides.

Please review and let me know if you have any questions. Thanks.

Timothy A. Dues, PE
Vice President
E-Z Construction Co., Inc.
7420 Distribution Dr.
Louisville, KY 40258
502-937-6855 office
502-639-9783 cell
www.ezconst.com

From: Jo Shipley <jo_shipley@bellsouth.net>
Sent: Wednesday, January 13, 2021 3:50 PM
To: Tim Dues <timdues@ezconst.com>; Brian Caudill <brian.caudill@att.net>
Subject: Re: Beechwood Park

Hi Tim,

We are resubmitting our grant request to the Kentucky Colonels for steps at Beechwood Park. We submitted a grant request in February of last year but due to the COVID-19 pandemic, the Ky Colonels decided to redirect all grant funding to the fight against COVID. The Colonels have reopened their grant application process for 2021. Below is the cost estimate you gave us last year. Is this still a good price for the job or do you need to revise the quote?

2/7/2021

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See specific instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Friends of Beechwood Park, Inc.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	5 Address (number, street, and apt. or suite no.) See instructions. 1643 Beechwood Ave.	Requester's name and address (optional)
	6 City, state, and ZIP code Louisville, KY 40204	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number								
				-			-	
or								
Employer identification number								
4	7	-	2	6	9	2	4	3

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶ <u>11/9/21</u>
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



Kentucky Secretary of State Michael G. Adams

FRIENDS OF BEECHWOOD PARK, INC.

File Annual Report	File Statement of Change of Principal Office	
File Statement of Change of registered Agent / Registered Address		
Printable Forms	Additional Services	Certificates

General Information

Organization Number	0908333
Name	FRIENDS OF BEECHWOOD PARK, INC.
Profit or Non-Profit	N - Non-profit
Company Type	KCO - Kentucky Corporation
Status	A - Active
Standing	G - Good
State	KY
File Date	1/23/2015
Organization Date	1/23/2015
Last Annual Report	4/16/2021
Principal Office	1643 BEECHWOOD AVENUE LOUISVILLE, KY 40204
Registered Agent	PATTI LINN 1643 BEECHWOOD AVENUE LOUISVILLE, KY 40204

Current Officers

President	Brian Caudill
Vice President	Kristen Millwood
Treasurer	Patti Lynn
Director	Al Gorman
Director	Jo Shipley
Director	Becca Alvord
Director	Corine Bordner

Individuals / Entities listed at time of formation

Director	BRIAN CAUDILL
Director	KRISTEN MILLWOOD
Director	DAWN SANDQUIST
Director	IAN LUYK
Director	BRIAN ELSTNER
Director	PATTI LINN
Director	CHARLOTTE WHITTY
Director	AMBER CANN
Director	KATHEY SCHICKLI
Director	GLORIA CHEEVER
Director	CANDICE LUYK
Director	CATHERINE ELSTNER
Director	AL GORMAN
Incorporator	BRIAN L. CAUDILL

Images available online

Documents filed with the Office of the Secretary of State on September 15, 2004 or thereafter are available as scanned images or PDF documents. Documents filed prior to September 15, 2004 will become available as the images are created.

Annual Report	4/16/2021	1 page	PDF	
Principal Office Address Change	8/5/2020 7:54:50 AM	1 page	PDF	
Registered Agent name/address change	8/5/2020 7:49:59 AM	1 page	PDF	
Annual Report	6/1/2020	1 page	PDF	
Annual Report	4/25/2019	1 page	PDF	
Annual Report	4/19/2018	1 page	PDF	
Annual Report	5/11/2017	1 page	PDF	
Annual Report	6/22/2016	1 page	PDF	
Articles of Incorporation	1/23/2015	4 pages	tiff	PDF

Assumed Names

Activity History

Filing	File Date	Effective Date	Org. Referenced
Annual report	4/16/2021 10:50:28 AM	4/16/2021 10:50:28 AM	
Principal office change	8/5/2020 7:54:50 AM	8/5/2020 7:54:50 AM	
Registered agent address change	8/5/2020 7:49:59 AM	8/5/2020 7:49:59 AM	
Annual report	6/1/2020 8:27:58 PM	6/1/2020 8:27:58 PM	
Annual report	4/25/2019 11:13:03 AM	4/25/2019 11:13:03 AM	
Annual report	4/19/2018 4:37:41 PM	4/19/2018 4:37:41 PM	
Annual report	5/11/2017 1:34:11 PM	5/11/2017 1:34:11 PM	
Annual report	6/22/2016 12:38:19 PM	6/22/2016 12:38:19 PM	
Add	1/23/2015 1:04:01 PM	1/23/2015	

Microfilmed Images

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Kentucky Unbridled Spirit