

J. O'Connell & Associates 
GRANTS CONSULTANTS

10646 Main Street, Clarence, NY 14031 | 716-759-8580 | www.grantsareus.com
Certified NYS Woman Owned Business

Marguerite Sherman, Mayor
Village of Medina
119 Park Avenue
Medina, NY 14103

July 26, 2024

Dear Mayor Sherman:

It was a pleasure getting to meet you and your board because of the Willow's Project. I feel I have begun to learn about the Village of Medina. I look forward to continuing to work with you on that project and applying next year.

I also would like to continue that relationship by being your Grants Consultant. We are pleased to prepare and present a request for grant consulting services. J. O'Connell and Associates is a corporation located in Western New York at 10646 Main Street in Clarence.

With over 30 years of experience, our firm has an extensive history of providing comprehensive grant writing and administration services to municipalities, school districts, and non-profit organizations throughout New York State. In the last 10 years, our municipal clients have been awarded over \$70 million in funding.

We are dedicated to helping our clients secure and utilize funding resources efficiently and effectively and prepare our clients for all aspects of the grants process. We are committed to building long-term relationships based on mutual trust and respect, maintaining high-quality work standards, and serving our clients with reliability.

We have included a detailed proposal as per your specifications. Our staff will ensure you always have an immediate response to questions regarding each type of grant you wish to apply for. And then, we will research all possibilities for your Village.

Please feel free to contact me directly with any questions so we may meet your specific needs. I can be reached at 716-759-8580 or via email at joconnell@grantsareus.com.

Thank you for considering J. O'Connell and Associates.

Very truly yours,


Jean K. O'Connell
President

PROPOSAL TO THE VILLAGE OF MEDINA-JULY 26, 2024

Statement of Qualifications

ORGANIZATIONAL OVERVIEW

J. O'Connell & Associates, Inc., located in Clarence, New York, was founded in 1989 by Owner and President Jean K. O'Connell. **Certified as a New York State 'Women Owned Business**, our firm has a long history of providing comprehensive grants consulting services to municipalities, school districts, and non-profit organizations throughout New York State, securing over \$208 million in funding for our clients. As a firm, we are dedicated to helping our clients obtain and use grant resources efficiently and effectively and prepare our clients for all aspects of the grants process to maximize the amount of funds raised. We are committed to building long-term client relationships based on mutual trust and respect, maintaining high-quality work standards, and serving our clients with reliability while exceeding their expectations.

Jean K. O'Connell – Founder & President

Jean has been meeting the grant development needs of municipalities, school districts, and nonprofit organizations since 1986. A certified teacher, Jean O'Connell brings a strong educational background and a wealth of varied experiences to the firm. Prior to becoming a full-time grants consultant, Jean taught school in area school districts, and then served for five years as the first Executive Director of the Clarence Senior Citizens Center, Inc. As Executive Director of a non-profit agency, Jean became aware of the financial and program needs of such organizations. This recognized need led her to the field of grants consulting. In 2001, *Business First* honored Jean in their "Who's Who Corporate Yearbook", in 2002 in "Who's Who Among Executive Women", in 2003 as a "Woman of Influence", and in 2005 she received *Business First's* "Women Who Mean Business" Award. In 2013, J. O'Connell & Associates, Inc. was named one of the 'Top 50 Women Owned Businesses in Western New York' by *Business First*. Jean is a member of the Association of Fundraising Professionals (AFP), WNY Chapter, and holds a Master of Science Degree in Education from the State University of New York at Buffalo.

Our staff includes grant writers and project administrators who enable us to offer turn-key grant development services of the highest quality. Our firm staffs full-time Grant Writers/Project Administrators and an Operations Manager who have extensive experience in grant writing, research, fundraising, program development and coordination, and business administration gained from previously working in schools and universities, non-profits, and local and state government agencies. All employees work on site and are not contracted writers. This allows immediate access to them when you need help or information.

For the past 35 years, J. O'Connell & Associates, Inc. has successfully performed grant consulting services for diverse clientele. Our firm has successfully directed the development and administration of grant-funded projects from all sources, including federal, state,

foundation, and corporate grant makers. We have developed excellent working relationships with state and federal funding agencies and their staff, including, but not limited to, NYSDOH, NYSOPRHP, NYS OCR, NYS DOT, NYS DOS, among others, to help lead projects to successful completion. All grants that we have administered have had successful close-outs.

COMMUNICATION is the most important part of the grant writing process! Having a contact person in Medina that will be able to provide us with the proper person(s) to work with is key. Also, constant contact allows us to know what projects need grant planning and we also send out notices concerning current grants. We maintain an Access Data Base that has all grants we have written, and it allows us to send you a monthly report with your invoice. It shows grant status (planning, pending or funded) and amounts.

GRANTS ADMINISTRATION is also an integral part of our services. Without project closeout done to the satisfaction of the program funder, the client receives a negative review and limits its chances for further funding.

Partial Listing of Completed Grant Administration Projects with low-income communities in BLUE

Client	Amount Funded	Funding Agency	Project
<i>Village of Bath</i>	\$1,180,000	NYS ESD Restore NY	Masonic Temple Restoration
<i>Village of Bath</i>	\$ 320,387	NYSOPRHP	Mossy Bank Park Improv. – Phase I & II
Town of Tonawanda	\$5,000,000	NYSDEC	2018 WQIP
Village of Brockport	\$ 200,000	NYS OCR	Main Street Grant
Buffalo Religious Arts Center	\$ 202,237	NYSOPRHP	Historic Preservation of Former Church Building
Town of Clarkson	\$ 298,125	NYSOPRHP	Ridgewood Park
Town of Gates	\$ 359,250	NYSOPRHP	Town Park and Hinchey House Historic Preservation
<i>Town/Village of East Rochester</i>	\$ 500,000	NYS OCR	Main Street Revitalization
<i>Village of Franklinville</i>	\$ 400,000	NYS OCR (Small Cities)	Mt. Pleasant Water and Sewer line Project
<i>Village of Holley</i>	\$ 250,000	NYS OCR	Main Street Grant
<i>Village of Holley</i>	\$ 600,000	NYS OCR (Small Cities)	Sanitary Sewer Infrastructure
<i>Village of Holley</i>	\$ 131,552	NYS Canal Corporation	Canal Park Improvements
Hull House Foundation	\$ 113,088	NYSOPRHP	Cultural Landscape Plan
<i>Town of Hume</i>	\$ 200,000	NYSOPRHP	Trails
National Women's Hall of Fame EPF-151634	\$ 500,000	NYSOPRHP	Development of Seneca Knitting Mill Complex
Town of Pembroke	\$1,269,800	NYS OCR, USDA Rural Development	Water District #3
Town of Pembroke, <i>Village of Corfu</i>	\$3,688,710	NYS DEC	WQIP - Municipal Sewer Collection System
Town of Seneca Falls	\$2,500,000	NYS ESD Restore NY	Rehabilitate Seneca Knit Mill into National Women's Hall of Fame
Town of Seneca Falls	\$ 148,830	NYS Canal Corporation	Canalside Boater Amenity Facility
<i>Village of Seneca Falls</i>	\$ 812,725	NYS DOT	TAP Grant
Town/Village of Seneca Falls	\$ 449,500	NYS DOS	Dissolution Implementation
Town of Urbana	\$ 432,518	NYS OCR	Hammondsport - Main Street Grant

If J. O'Connell & Associates is chosen as your Grants Consultants, we will represent you, and have no motive to only write grants that bring funds to us. (i.e., as an engineering firm would do). We will always have enough staff to meet your needs and have loyalty to the Village of Medina and its residents.

Examples of Larger Funded Projects for Towns, Villages and Counties

<u>Client</u>	<u>Project</u>	<u>Funder</u>	<u>Award</u>
Village of Albion	Main Street Improvement	NYS Office of Community Renewal	\$388,192.00
Depew	Fireman's Park Upgrades/Trails	NYS - Parks & Rec.	\$362,000.00
East Rochester	Elevator & Building Improvements	Monroe County Funding	\$400,000.00
East Rochester	Road & Pedestrian walkway Upgrades	NYS-DOT	\$1,518,053.00
Niagara County	Roadway Improvements	Federal Senate Apprriation	\$530,000.00
Niagara County	Continuum of Care (Health/Safety)	HUD	\$106,056.00
Niagara County	Parks, Recreation and Trails Upgrades	Niagara River Greenway Project	\$362,935.00
Smithtown	Permenant Records Digitizing	NYS Archives Division	\$149,000.00
Town of Orchard Park	Community Ctr. Upgrades	Community Development Block Grant	\$391,154.00
Town of Orchard Park	Dennis Rd. Bridge/Culvert replacement	NYS-DOT	\$1,000,000.00
Town of Orchard Park	Community Ctr. Generator & Upgrades	CDBG	\$391,154.00
Town of Orchard Park	Grinder / Vehicle / Waste & Recycling Project	NYS - DEC	\$393,106.00
Town of Orchard Park	65 Gallon Recycling TOTES	NYS - DEC	\$189,414.00
Town of Orchard Park	Community Ctr. Handicapped accessibility & renovations	State & Municipal Facilities Program	\$500,000.00
Town of Orchard Park	Sidewalk repair / replacement	NYS-DOT	\$1,600,000.00
Town of Pittsford	Senior Center Pavillion	Community Development	\$206,299.00
Town of Pittsford	Road enhancements - Thornell/Mendon Rds.	NYS-DOT	\$540,000.00
Town of Tonawanda	Sewer Planning Grant	NYS-DEC	\$100,000.00
Town of Tonawanda	Kenney Field Park Upgrades	Local Capital Improvement Fund	\$250,000.00
Town of Tonawanda	Senior Center Upgrades	Federal CDBG Funds	\$825,755.00
Town of Tonawanda	Multi Use Pedestrian Trail	NYS Parks & Recreation	\$1,696,000.00
Town of Tonawanda	Drinking Water Filtration WIIA	NYS-EPF	\$3,000,000.00
Town of Tonawanda	WQIP - Sewer lining repairs	NYS-DEC	\$15,000,000.00
Town of Urbana	Curtiss Park Upgrades	NYS Dept. of State	\$945,691.00
Whitestown	Headstone Restoration	NYS Div. of Cemeteries	\$154,000.00

\$30,998,809.00

CFA - Town of Urbana

Q_4199 Please select the primary sector or characterization that best defines this project.

Waterfront Revitalization

Q_4198 Please select the secondary sector or characterization that best defines this project.

Tourism/Travel

Project Description

Q_575 Project Description. Concisely describe the project, indicating the location, what will be planned, designed, acquired, and/or constructed, the issues/opportunities to be addressed, and expected outcomes and deliverables. Additional details will be collected later in the application process.

The Town of Urbana, in Steuben County, requests \$945,691 in funding, with a 15% local match of \$166,887 for a total project cost of \$1,112,578 to develop Phase 2 of Curtiss Park. Upon completion, it will connect three local parks with trails throughout the region. It involves connecting to Phase 1 trails, continuation of the trail into a stoned parking lot and additional passive trails along the waterfront, observation tower, and an ADA-compliant kayak launch. The trails will connect the Hammondsport central business district to Curtiss Park, Keuka Lake, Champlin Beach, and the Finger Lakes Trail via the Triad Trail.

The Town only owns 9 miles of waterfront because the lakefront is densely developed, predominantly with private residences, and only about 7% of the lake's shoreline is accessible to the public. To increase the amount of open space and recreational amenities available to residents, and visitors, the Town acquired 7 acres of waterfront property from the Bath & Hammondsport Railroad. The Curtiss Park property, is listed in the New York State Open Space Conservation Plan as a priority conservation project. Completion of this project will conserve 7 acres of open space.

Q_976 Statement of Need

The Town of Urbana operates and maintains 18.2 acres of parkland. The primary facility is Champlin Beach Park, which offers limited waterfront access to Keuka Lake. However, due to its location on the southern side of Keuka Lake Inlet, it is not easily accessible by pedestrians in the high-density, residential center of the Urbana/Hammondsport Region. Curtiss Park will create that access. The total cost for this project is \$1,112,578. The Town is committed to providing the required 15% match (\$166,887) for the project through in-kind services and town funds. Due to the environmentally sensitive nature of the project, and the high cost of Phase 2 completion, this project is too large in terms of scale and cost for a town with an estimated population of just 2,404 (as of 2020 Census update) to complete using only local resources.

Q_2366 How does your project align with the Regional Economic Development Council's Strategic Plan/Upstate Revitalization Initiative Plan? (strategic plans are located at <https://regionalcouncils.ny.gov/>)

One of the goals laid out in the Finger Lakes Regional Economic Development Council's Strategic Plan is to "Strengthen and support the development of the Finger Lakes' diverse water resources

and recreational tourism opportunities, allowing greater access and promoting year-round use" (p. 18). This project will directly address this goal, allowing for recreational opportunities for people of all abilities, increasing access to Keuka Lake, and promoting tourism in the surrounding area.

Q_930 Explain what makes your project a regional economic priority - for example creates jobs, economic investment, sustainability and community revitalization, government efficiency or consolidation etc.

Curtiss Park is integral to the area's image and economic niche in the tourism industry, promoting revenue generation and visual appeal by providing visitors and residents with a recreational amenity that is a short walk to a bustling downtown business district. This project will support economic and community revitalization at Keuka Lake, a major tourist attraction in the Southern Tier. Additional trails, parking, kayak launch will increase waterfront access, connect to Phase 1 improvements, and to downtown Hammondsport and the Finger Lakes Trail. An estimated 10 construction jobs and 1-2 additional town employees will be employed through this project. It will create economic revitalization in the surrounding community, attracting tourists to waterside businesses, bed and breakfasts, water sports, and the newly renovated Curtiss Museum.

Q_9527 Does your project advance downtown revitalization and strategic community investment?

Yes

Q_9528 If Yes, please detail how it will advance downtown revitalization and strategic community investment.

The southern end of Keuka Lake does not offer the same amenities as the north end or other Finger Lakes. The Town is filling this void. The Town and Village together encompass approximately 9 miles of shoreline, a tremendous recreational, scenic, environmental, and tourism asset. However, the lakefront is densely developed, predominantly with private residences, and only about 7% of the lake's shoreline is accessible to the public. This project will grant access to the southern Keuka Lake waterfront so that residents and approximately 250,000 tourists to the area each year can experience this beautiful natural resource. Due to the proximity to nearby businesses, they will enjoy the economic revitalization this project will create.

Q_9531 Does your project incorporate environmental justice practices?

Yes

Q_9532 If Yes, please detail how it will incorporate environmental justice practices.

The Town of Urbana is recognized as an Environmental Justice Community (Refer to attached map) and will incorporate Environmental Justice practices. When completed, this project will be open to all people, even those who are marginalized and left behind. Curtiss Park will be open to all residents and visitors alike, including making the park handicapped accessible to those with disabilities. There will be no charge to enjoy this pleasant green space, and as word spreads about the area, the Town anticipates drawing people from the entire WNY Area, including the Cities of Buffalo and Rochester.

Q_3762 Does your project directly address the needs of people in your region who are living in poverty and who seek resources for inclusion in the economic life of New York State?

Yes

Fee Schedule Hourly / Per Grant

Grant Writing Services:

Hourly Rates:

President / Owner	\$20
Operations Manager	\$150
Staff Grant Writer	\$125

Grant Administration Services:

\$90 per hour (sometimes Administrative Services are included in the grant)

Note: -Approximately 75 % of the hours for all grants will be billed as Staff hours (\$125/hour)

-We will give a solid estimate of hours before proceeding on any grant

Retainer Option

J. O'Connell would like you to consider another option. The majority of our clients sign a one-year contract or two-year contract keeping the fee the same.

Advantages to this method include:

- We will do a thorough needs assessment with all department heads and pertinent staff.
- We will write, review, prepare and submit grants on a continuous basis-no limit.
- Paying us monthly allows you to know the cost ahead of time, so you can budget.
- Contracted clients' fees allow us to budget for the proper number of employees to service your needs.
- We always accommodate our yearly client needs and meet their deadlines as a priority.
- We write all size grants, and sometimes the small ones take more time than the amount of award, yet are very important to the residents, and produce a lot of publicity.
- The retainer fee works out to spending less money and obtaining more grants.

Monthly Grant Writing charge: \$3,000 pr. month

Grant Administration Services: \$80 per hour



References:

A true reflection of the quality of work produced by a company is the ability to establish long term relationships with clients that span years. We are dedicated to building just such long-term relationships with our clients based on mutual trust and respect, maintaining high quality work standards, and serving our clients with a high degree of reliability while consistently exceeding expectations. We urge you to contact any, or all, of these clients listed below for a reference; some like the Town/Village of East Rochester have been clients for many years.

(1) Village of East Rochester (Client since 2010)

Martin G. D'Ambrose
Village Administrator
120 West Commercial Street
East Rochester, NY 14445
Phone: 585-586-3553
Email: mdambrose@eastrochester.org

Through our services, the Village of East Rochester has been awarded over \$1.9 million dollars in grant funding covering projects of major importance to the Village. J. O'Connell & Associates also provides grant administration to East Rochester. Examples of successful grant funding include:

- *NYS Office of Community Renewal (\$500,000)* - Main Street Grant, Downtown Revitalization Program,
- *NYS Education Department (\$375,224)* - Relocating existing library to Eyer Building,
- *NYS Empire State Development (\$200,000)* – Eyer Building,
- *NYS Archives (\$139,060)* - Inactive Records Room,
- *NYSOPRHP: (\$278,962)* - Legion Eyer and Edmund Lyon Park,
- *NYSOPRHP:(\$250,000)*- Acquisition and Development of Linden Park.

“Jean and her entire staff are well qualified to serve businesses, agencies and municipalities like ours who lack the expertise in Grant Writing & Administration. Over the past 5 years we have been quite successful in obtaining more than 2- million dollars in vital funding for infrastructure upgrades/improvements to the Public Library, Town Justice Court, new Municipal Center and for upgrades to our parks; as well as the replacement of playground equipment.”

D'Ambrose, Village Administrator (2022)

(2) Orleans/Niagara BOCES (Past client for 21 years)

Dr. Clark Godshall-Retired 7/1/2024
District Superintendent
4232 Shelby Basin Road - Medina, NY 14103 - Phone: (716) 523-1730 cell
Email: superintendent@onboces.org

Through our services, the Orleans/Niagara BOCES has received over \$7.7 million dollars in grant funding covering projects of major importance to local school districts. Examples include:

- *NYS Education Department (\$3,470,577)* – Title 1 grants \$950,290; Universal Pre-K \$383,400; Project SAVE K-12 \$119,079; Reading First \$1,711,668
- *U.S. Department of Education (\$2,603,883)* – Crisis Management Plans \$1,164,291; Carol White PEP grants \$883,769; Counseling Programs \$430,823
- *U.S. Department of Justice (\$509,540)* – COPS in Schools grants
- *NYS Archives (\$547,964)* – Record Management grants

“As District Superintendent of the Orleans/Niagara BOCES, I have had the pleasure of working with Jean K. O’Connell and her staff for more than 20 years.she has completed many consortium-wide grants each year and cumulatively has acquired over \$7 million on behalf of our local school districts and BOCES. I would recommend Ms. O’Connell and her firm to any organization that wishes to actively pursue grant funds.”

Dr. Clark Godshall, District Superintendent

(3) Town of Tonawanda (client since 2020)

Joseph Emminger, Town Supervisor

Matthew Sutton, Head Engineer

2919 Delaware Ave.

Tonawanda, NY 14150

Phone: 716-957-1570

Email: jemminger@tonawanda.ny.us; msutton@tonawanda.ny.us

The Town was awarded over \$19 million dollars in grant funding through our services, covering projects of major importance to the Town. Examples of successful grant funding include:

- *NYS Department of Environmental Conservation (\$10,000,000)* – WQIP Clean Water
- *NYS Office of Parks, Recreation and Historic Preservation (\$500,000)*
- *NYS Department of Environmental Conservation (\$37,000)* – Urban Forestry Inventory/Management Plan

(4) Town of Orchard Park (client since 2016)

Eugene Majchrzak

Town Supervisor

4295 South Buffalo Street

Orchard Park, NY 14127

Phone (716) 662-6400

Email: emajchrzak@orchardparkny.org

The Town was awarded over \$5 million dollars in grant funding through our services, covering projects of major importance to the Town.

- *NYS DOT (\$1,600,00) Sidewalk repair and additions*
- *NYS DOT (\$1,000,000) Bridge and Culvert repairs*
- *State and Municipal Facilities Programs (\$500,000) Community Center Upgrades and Enhancements*