



LEXINGTON

RFP-27-2021

**United Way of the Bluegrass
United Way of the Bluegrass, Inc.
Supplier Response**

Event Information

Number: RFP-27-2021
Title: Adaptive Reuse of Former Palmer Pharmacy Building
Type: Request For Proposal
Issue Date: 8/6/2021
Deadline: 9/21/2021 02:00 PM (ET)
Notes: Only online submittals will be accepted through IonWave.

Contact Information

Contact: Sondra Stone
Address: Central Purchasing
Government Center Building
Room 338
200 East Main Street
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Fax: (859) 2583322
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United Way of the Bluegrass Information

Contact: Eli Yussuf
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Email: eli.yussuf@uwbg.org
Web Address: www.uwbg.org

ONLY ONLINE BIDS WILL BE ACCEPTED! By submitting your response, you certify that you are authorized to represent and bind your company and that you agree to all bid terms and conditions as stated in the attached bid/RFP/RFQ/Quote/Auction documents.

Jonathan Kohn

Signature

Submitted at 9/21/2021 8:20:46 AM

jonathan.kohn@uwbg.org

Email

Response Attachments

UWBG Palmer Pharmacy Reuse Proposal.pdf

Narrative response

UWBG IRS Determination Letter.pdf

UWBG IRS Determination Letter. Audited financials available at: <https://www.uwbg.org/impactandfinancialreports>.

UWBG Org Chart 2021.pptx

UWBG organizational chart.



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248336501
Aug. 19, 2008 LTR 4168C EO
61-0444679 000000 00 000
00020741
BODC: TE

UNITED WAY OF THE BLUEGRASS INC
2480 FORTUNE DR STE 250
LEXINGTON KY 40509-4259507

Employer Identification Number: 61-0444679
Person to Contact: Mary J. Holland
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your request of Aug. 08, 2008, regarding your tax-exempt status.

Our records indicate that a determination letter was issued in August 1955, that recognized you as exempt from Federal income tax, and discloses that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

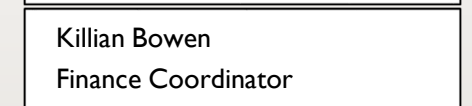
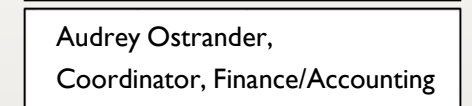
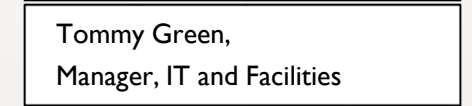
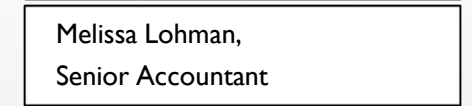
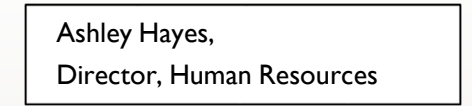
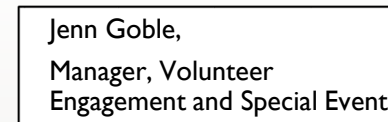
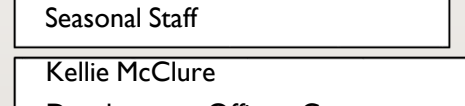
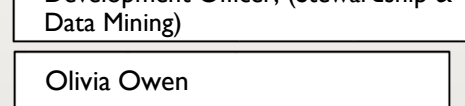
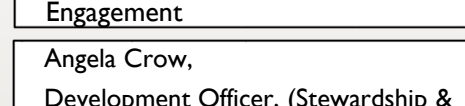
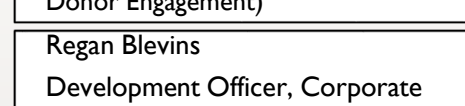
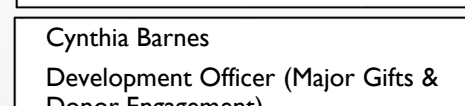
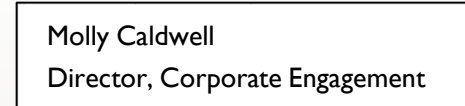
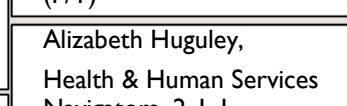
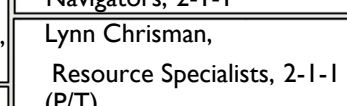
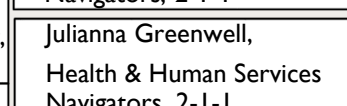
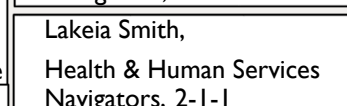
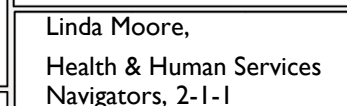
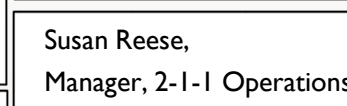
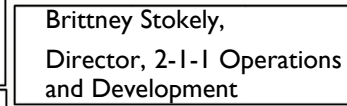
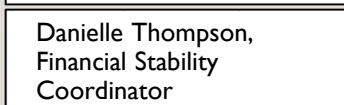
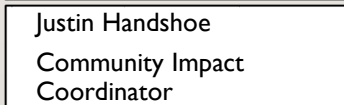
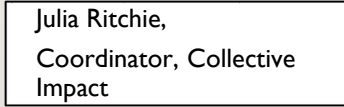
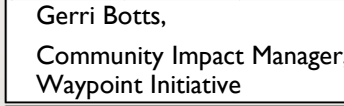
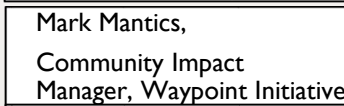
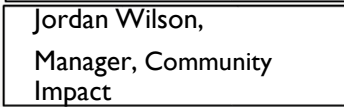
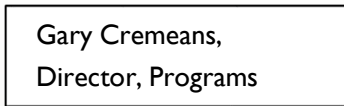
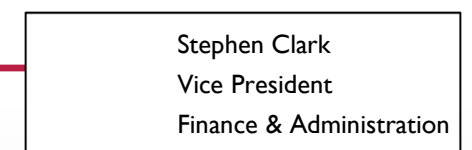
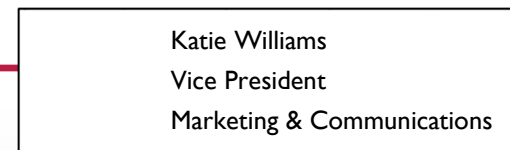
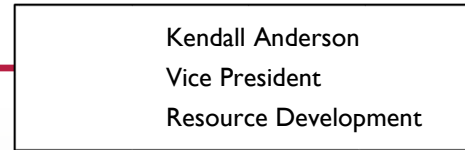
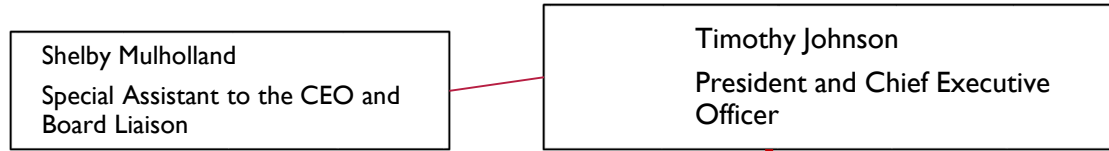
Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Michele M. Sullivan, Oper. Mgr.
Accounts Management Operations I

UWBG ORGANIZATION CHART



**Response to Bid Number: RFP-27-2021
Adaptive Reuse of the Former Palmer Pharmacy Building
Located at 400 East Fifth Street Lexington, Kentucky 40508**



Proposal Submitted by:

United Way of the Bluegrass
651 Perimeter Dr., Suite 510
Lexington, KY 40517
EIN: 61- 0444679

President & Chief Executive Officer:

Timothy Johnson
Timothy.Johnson@uwbg.org
(859) 967-1921

Contact:

Jonathan Kohn
Vice President, Community Impact
Jonathan.Kohn@uwbg.org
(859) 533-4167
www.uwbg.org

United Way of the Bluegrass is a registered 501(c)3 organization in good standing (organizational chart and verification of 501(c)3 status attached).

United Way of the Bluegrass (UWBG) proposes the renovation and repurpose of the former Palmer Pharmacy Building as a neighborhood-based hub for health and human services programming to benefit families of the surrounding neighborhood. UWBG refers to such centers as “WayPoint Centers”.

WayPoint Centers are the next step in the evolution of delivery of non-profit-based health and human services in Lexington. UWBG’s WayPoint strategy was born out of an in-depth analysis of our regional community and current demographics, and a meaningful understanding of what our community needs to evolve into a better, more resilient Bluegrass. WayPoint’s mission is to create a One-Stop access point for families and individuals, and to provide vital programming to people living in underserved neighborhoods and communities of color. WayPoint Centers coordinate an ecosystem of partners and programs to have the greatest impact on local families from a physical and place-based anchor in their communities. UWBG has launched its inaugural three (3) WayPoint Centers in neighborhoods across our region where our help is needed most. The three centers are located in 1) Lexington’s West End (Black and Williams Recreational Center), 2)

Lexington's East End (temporarily in the Charles Young Recreational Center) and 3) in Paris, KY at the Bourbon Paris YMCA. Our team of community impact specialists meet participants where they are on their journey forward and provide personalized support to help stabilize individuals in crisis, move families toward self-sufficiency, and create innovative solutions to break the cycle of generational poverty.

WayPoint Centers are a place where the community can go to lean on a trusted neighbor and access exceptional services. WayPoint Centers will help stabilize, grow, and empower every person and family, no matter their current financial situation or zip code.

Dr. Palmer, was a veteran of the Second World War and married fellow veteran Marian Elspy Sidney. The couple moved to Lexington, Kentucky in 1952 where Dr. Palmer purchased the property on the southeast corner of 5th Street and Chestnut Street, and established "Palmer's Pharmacy, Luncheonette, and Doctor's Office" in 1961. Dr. Palmer's drugstore was the only black-owned drugstore in town; as a franchise of Rexall, it was the company's first drugstore in the country to be owned by an African American. Palmer's business fostered relationships in the community and was a boon to the neighborhood. It offered a convenient location for people to obtain their medications, and its soda fountain and lunch counter served a social function as a gathering place. The building also housed doctors' offices on the second floor, providing another essential service. Palmer helped students find employment by hiring them to deliver prescriptions or connecting them with opportunities at local businesses. Following in the footsteps and the spirit of Dr. Palmer, UWBG's WayPoint Centers serves as that same junction point between people and services, helping to provide essential services and foster collaborations between community stakeholders.

Dr. Palmer was one of the first black pharmacists in Lexington as well as University of Kentucky's first black trustee. Gaining ownership of the Palmer Pharmacy Building will allow UWBG to memorialize the story and accomplishments of Dr. Zirl Palmer and to safeguard it in a place where community members and Lexington residents can both learn about and celebrate this accomplished son of Lexington.

The ability to relocate and expand services into the Palmer Pharmacy building will ensure that one of our city's most underserved neighborhoods (East End) has a one-stop location offering a multiplicity of services in a place-based model where families are able to access the resources they need to thrive.

While Lexington's community of non-profit organizations offers a wealth of programming to our underserved and low-income neighbors, in almost every case, individuals who reside in our community's most vulnerable neighborhoods must travel to access those essential services. The WayPoint Center at the Palmer Pharmacy Building will bring critical and empowering services from across the city to the East-End neighborhood at a centralized location that is walkable for neighborhood residents. Staff at the East End WayPoint Center are already helping families to assess and address their specific needs in as holistic a way possible, focusing on family financial stability, and building in a bundled-services approach to address a host of other possible needs. This suite of on-site services provides families with more opportunities to achieve stability, which then allows families to explore ways in which they can grow and empower themselves to achieve new heights. Neighborhoods grow stronger and more resilient when families are empowered with the resources they need to thrive. WayPoint Centers are becoming a cornerstone of the neighborhoods they serve, with community-based events that bring families together and call attention to WayPoint services.

Targeted Population and Service Specifics:

Because of the central location of the Palmer Building, UWBG believes that a WayPoint Center therein would create an access point for the entire East-End Neighborhood (in this case, Fayette County Census Tracts 3 and 4). The data associated with this neighborhood demonstrates drastic inequality, and need for access to services:

- Per-capita Income: \$12,911
- Household Income: \$21,486
- Children Below Poverty: 62%
- Non-White: 63%
- Homes Rented: 74%

In addition, because this neighborhood, as defined by the census tract boundaries, overlaps well with the Fayette County Public Schools districting map for William Wells Brown Elementary School, it is possible to approximate the impact of families' lack of access on their kids' ability to succeed. For example:

- The percentage of neighborhood students reading on grade level by 3rd grade: 17.3%

- The percentage of neighborhood students who are on grade level in math by 3rd grade: 21.2%
- The percentage of non-white students is: 88%
- The percentage of neighborhood students who receive free/reduced price lunch: 97%

WayPoint has established an access point for a robust ecosystem of programming, delivered by a diverse set of partner agencies, anchored by family financial stability programming, that addresses neighborhood family needs in a holistic way. Specially trained staff are on site to assess individual needs and recommend a set of programming to set families on the road to success. All of this will be easily accessible to neighborhood families at the centrally located Palmer Pharmacy WayPoint Center. This center will be open to the public for a minimum of 40 hours per week, which will include peak hours such as evenings and weekends, from noon to 8pm Wednesday through Sunday, with the potential to include additional hours in the future.

All 4,700 neighborhood residents (as well as low and moderate income Lexingtonians as a whole) are invited to utilize the services that are offered within the center during open hours; however, UWBG's goal for the first year of operation is to serve a minimum of 500 neighborhood residents. Target recipients of all services will be low-income individuals and families. Future expansion of the WayPoint initiative will potentially target the Cardinal Valley neighborhood as we believe that the unique approach will build stability there as well.

Facility Use:

UWBG intends to restore and rehabilitate the Palmer Pharmacy Building in a way that pays homage to Dr. Zirl Palmer and his legacy of service to the Lexington Community. UWBG will work with the local historical preservation society to ensure that the exterior of the facility remains reflective of Dr. Palmer's accomplishments and vision, while the interior may feature an exhibit honoring his works. Dr. Palmer's name will also be prominently featured as a part of the program's nomenclature (for example, the Dr. Zirl Palmer WayPoint Center).

The center will serve as an anchor point within the community for a robust partnership of health and social service non-profits to come together and offer their services to the surrounding community. UWBG will install permanent family financial stability programming at the facility, which will include a suite of programs designed to empower families by providing the resources

necessary to achieve financial growth. Research shows that families who are financially stable are more than twice as likely to have kids that are successful in school. When families succeed, kids succeed. Further, when kids are successful in school, neighborhoods begin to change, grow, and become healthier. Such programming includes:

Stabilization:

- Individualized 1-on-1 budget counseling
- Free year-round income tax services
- Money management workshops
- Community financial empowerment and awareness events

Growth:

- Individualized 1-on-1 debt and credit counseling
- Savings habit building
- Access to mainstream banking products

Empowerment:

- Asset acquisition
- Home purchase
- Small business startup

WayPoint Center financial stability programming is coupled with on-site bundled services designed to meet immediate needs and promote long-term stability and reinforced by an ecosystem of partners coordinating to best serve neighborhood families. National research from the Annie E. Casey Foundation shows that families who receive “bundled services” (more than one financial stability service, and/or financial stability services combined with wrap-around services to meet other immediate needs), are more than three times more likely to achieve their economic goals. Furthermore, neighborhood stability is increasing one family at a time through WayPoint’s unique set of interventions, in turn stabilizing the neighborhoods tax base and encouraging businesses to invest in the neighborhood. Examples of the bundled services at the center will include the following:

- Programs creating access to basic needs such as food, clothing, and rent and utility assistance (Community Action Council)

- Programs creating access to healthcare and promoting healthy lifestyles (University of Kentucky)
- Programs that help families to prepare young children for kindergarten (Child Care Council; YMCA of Central Kentucky)
- Programs that help students succeed in school, such as Nontraditional Instruction Program (NTI) supports, tutoring, and homework help (YMCA of Central Kentucky; Urban League; Big Brothers Big Sisters)
- Programs that help families to maximize their economic well-being and career potential through job training, job placement, skill development and financial counseling (Jubilee Jobs of Lexington; Apprisen; Community Action Council; UWBG; local banks and other financial institutions)
- Programs that help families to feel safe and secure in their neighborhood (Urban League; The Nest)

UWBG is leveraging its 100-year history as a collaborator and consensus builder within our community to build the most effective and robust ecosystem of partners possible to address the needs of the East End neighborhood. In addition, the Palmer Pharmacy WayPoint site will be staffed full-time by facility staff who are intimately familiar with and connected to the community.

The WayPoint Center is designed to evolve along with the needs of its community – that’s why UWBG felt that now is the time to establish a collective-impact-style initiative with a physical location inside our community’s most vulnerable neighborhood. The COVID-19 pandemic has exacted disproportionately poor health and social outcomes on low-income communities, and particularly on communities of color. WayPoint is helping to stabilize neighborhoods in preparation for future times of crises such as these by creating an in-neighborhood access point for services that these communities desperately needed. For example, an access point for food, NTI help for kids, COVID-19 testing, Personal Protective Equipment (PPE) distribution, help with government-issued payments (including income tax refunds and Child Tax Credits), access to unemployment and job training, and other critical needs affected by the pandemic can reduce some of the inequity in negative outcomes experienced in the East End.

Given the likelihood of changing community needs dictating the necessary addition of other/additional programming in the future, the WayPoint Center will be flexible in adapting to these needs and will add or modify programming based on those needs.

Financial Feasibility:

The WayPoint Initiative forms the cornerstone of UWBG's community impact work. Fundraising for both the programming native to the Center, and for funding for partner programs within the facility, therefore, will be integrated with UWBG's normal fundraising operation. We approximate a need for \$250,000 per year in operating revenue for the WayPoint Center at the Palmer Building, which will be incorporated with UWBG's annual multi-million dollar fundraising campaign.

UWBG is currently in the process of seeking partners who will assist with the remainder of the cost of rehabilitating the Palmer Pharmacy Building. Financing is expected to be drawn from a combination of private investments, sponsorship and naming-rights opportunities, and in-kind donations of construction, repair, and general contracting from UWBG's long list of corporate partners. One such partner is the Blue Grass Trust (BGT), with which we jointly applied for funding earlier this year and secured a \$50,000 grant, as well as another \$50,000 in private contributions to support redevelopment of the pharmacy building should UWBG be granted ownership of the building (a condition established by BGT).

Community Benefit:

In a broad sense, over the course of the next five years, the Palmer Building-based Waypoint Center will help to improve the overall health of its surrounding neighborhood. The health of a community can be measured in many ways, but United Way and its partners have agreed that Waypoint Centers can assess the health of their neighborhoods based on how well its kids and families are doing. We believe that improvement in school performance, in household income, in homeownership, and many more community demographics are solid indicators of improvements in neighborhood health, in family wellness, and in meeting the needs of our most underserved

neighbors. Therefore, data that Center staff will track will relate not just to the individuals that that they connect to needed services every day, but also in the overall well-being of the East End neighborhood.

Together with its partners, UWBG will build resiliency, reduce inequality, and quash neighborhood adversity, one family at a time. And the success of the partnership will be judged by the health of the neighborhood itself, starting with the kids, and reaching all the way to its seniors.

By directly addressing the problem of access for underserved and low income residents in the surrounding neighborhood, the WayPoint Center is currently, and will continue to create lasting, positive change for an entire community by addressing the holistic, complex, and interwoven needs of families, thus creating a brighter tomorrow for the entire neighborhood.

History:

UWBG has been a part of the Lexington philanthropic community for 100 years. In that time, it has built a long track record of building collaboration among our community's diverse non-profit organizations. In fact, last year alone, UWBG partnered with over 60 non-profit agencies across the region to provide over 120,000 instances of service to low-income and underserved Central Kentuckians in the areas of education, income, and health. UWBG sees the WayPoint Initiative as the next step in the evolution in the way that we impact our community, building on its past success by bringing partners together around a common cause.

UWBG will continue to leverage our role as a convener of non-profit agencies to make a difference in the lives of Lexingtonians, but the WayPoint Center at the Palmer Pharmacy Building will allow us to do it in a way that brings critical services to the folks in our City's most underserved neighborhoods. With WayPoint as an anchor point within the community, UWBG partner agencies can and will provide their services right next door to some of our most vulnerable friends and neighbors. Within walking distance of their homes, families now have access to basic needs services, financial stability services, out-of-school educational supports, kindergarten readiness

initiatives, workforce development programming, mentoring and tutoring services, neighborhood safety initiatives, and much more.

UWBG believes that it is uniquely positioned to bring a collaborative, non-profit-based, holistic program to the Palmer Pharmacy Building in a way that both addresses the specific needs of the surrounding neighborhood, and pays homage to Dr. Palmers incredible legacy.

Timeline:

The WayPoint Initiative officially launched in July of 2021; however, UWBG is currently using space at the City-owned Charles Young Center on a temporary basis until it can identify a permanent home for WayPoint in the East End. From a programmatic perspective, nearly two years of work has already been completed, including preparatory work in establishing the foundation and framework for WayPoint. From a construction perspective, UWBG recognizes that it may be some time before the initiative's permanent home is complete. If we are successful in raising the necessary funds needed to complete restoration of the building, UWBG would begin immediately:

1. Seek contracting proposals: Q1 2022
2. Filing/Permitting Deadlines: Q2 2022
3. Construction/Renovation Begins: July 2022
4. Construction/Renovation Ends: December 2022
5. WayPoint Center at the Palmer Pharmacy Building Opens to the Public: January 2023