

# Grant Approval Memo



**Grantee:** Southeast Alaska Independent Living, Inc.  
**Request Amount:** \$75,000.00  
**Project Title:** The ORCA Training, Travel, and Scholarship Initiative for Beneficiary Wellbeing  
**Grant Term:** 7/1/2026 to 6/30/2027  
**Trust Staff:** Kelda Barstad

## Staff Analysis:

- What does this project do?

Trust funds will pay for staff training, required travel, and participant scholarships that allow ORCA to safely deliver adaptive recreation and transition-focused activities across Southeast Alaska. Funding ensures staff receive essential certifications, that programming can be brought to multiple communities, and that beneficiaries who cannot afford fees can participate fully. These investments expand safe access to inclusive recreation and skill-building opportunities for Trust beneficiaries. Examples of the types of training include: cold water immersion, wilderness first aid, American Canoe Association training, and adaptive snow sports.
- Who is receiving the funds?

Southeast Alaska Independent Living Center (SAIL) is a 501c3 nonprofit operating in Southeast Alaska. SAIL empowers seniors and people with disabilities by providing services and information to support people in making choices that will positively affect their independence and productivity in society. SAIL has assisted Trust beneficiaries and others with disabilities and chronic conditions to obtain grant and Medicaid waiver services, employment, transportation, recreation, and peer support. They operate multiple programs including: Independent Living Centers, Aging and Disability Resource Centers, Developmental Disabilities Resource Centers, Brain Injury Supports, Employment Services, Equipment Loan Closets, Veteran HCBS Programs, and an adaptive recreation program.
- Why is staff recommending this project?

SAIL serves a large number of Trust beneficiaries across Southeast Alaska, many of whom experience isolation, limited social engagement, and few opportunities for adaptive, skill-building recreation. The ORCA Training, Travel, and Scholarship Initiative directly supports these beneficiaries by removing financial and geographic barriers, expanding access to inclusive recreation, and strengthening staff capacity to safely deliver activities in varied and remote environments. One of the programs adds pre-employment activities for youth as a component of the outdoor recreation program to prepare them with skills needed for the workforce.

These trainings and scholarships help beneficiaries build confidence, practice communication and teamwork, increase physical activity, and develop skills connected to employment readiness. The initiative aligns with the Trust's priorities by improving wellbeing, promoting community connection, and supporting people to live meaningful, self-directed lives in the least restrictive environment. The train the trainer models will bring valuable training resources back to Alaska to be shared with other programs and leaders in the ORCA program, to include beneficiaries.

Will this be a multi-year project?

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This is a one-time project.

## **Trust Five Year Funding History**

<b><u>Fiscal Year</u></b>	<b><u>Project Title</u></b>	<b><u>Amount</u></b>	<b><u>Status</u></b>	<b><u>Final Expended</u></b>
2026	Evaluating Access to Environmental Modifications	\$116,200	Active	Grant ends 6/30/2027
2023	Employment through Recreation for Transition-Age Youth	\$50,000	Closed	\$50,000
2023	Outreach and Training Project	\$17,250	Closed	\$6,601.00

## **Comp Plan Identification**

<b><u>Area of Focus</u></b>	<b><u>Objective</u></b>	<b><u>Comments</u></b>
Area of Focus 7: Services in the Least Restrictive Environment	7.2 Increase access to effective and flexible, person-centered, long-term services and supports in urban and rural areas to avoid institutional placement where inappropriate	Also 9.1

## **Trust Focus Area Connection**

<b><u>Budget Area</u></b>	<b><u>Strategy</u></b>	<b><u>Comments</u></b>
Housing & Home & Community Based Services	HHCBS - Beneficiaries access effective and flexible person-centered HCBS	

## **Project Description (from grant application)**

Southeast Alaska Independent Living (SAIL) serves as both the region's Center for Independent Living and its Aging and Disability Resource Center. SAIL provides services across Juneau, Ketchikan, Sitka, Haines, Klawock, Angoon, and Kake, and offers itinerant services to another dozen rural communities. One of SAIL's most impactful programs for Trust Beneficiaries is Outdoor Recreation and Community Access (ORCA).

For individuals with developmental and intellectual disabilities, mental illness, and traumatic or acquired brain injuries, access to meaningful recreation is not a luxury, but a critical pathway to improved mental health, physical wellness, social connection, and long-term independence. Trust Beneficiaries frequently experience isolation, limited community engagement, and a lack of safe and inclusive recreational opportunities. These barriers are especially pronounced in rural communities where staffing, transportation, and specialized training are limited.

ORCA directly addresses this gap by providing year-round, inclusive recreation and employment-focused programming such as kayaking, biking, hiking, adaptive snowsports, ropes course activities,

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craft nights, and group community events. These activities create safe spaces where Beneficiaries build confidence, practice communication, develop emotional regulation, and form meaningful peer relationships. Participants consistently report increased self-esteem, reduced isolation, and a stronger sense of belonging as a result of ORCA involvement.

In partnership with school districts and the Alaska Division of Vocational Rehabilitation, ORCA also delivers Pre-Employment Transition Services (Pre-ETS) that integrate recreation with workforce skill development. Through hands-on group activities, youth who struggle in traditional classroom environments gain practical experience in teamwork, problem-solving, leadership, and decision-making. These skills directly translate into improved employment readiness and long-term independence.

The ORCA Training, Travel, and Scholarship Initiative for Beneficiary Wellbeing strengthens this impact by ensuring that financial barriers never prevent participation, and that staff are fully equipped to deliver safe, high-quality programming across the region. Scholarships allow Beneficiaries from under-resourced households to access the same opportunities as their peers and support equitable participation regardless of income. At the same time, staff training and certification ensure that activities are conducted safely, inclusively, and in alignment with national best practices, particularly in remote outdoor environments where safety and trauma-informed care are essential.

Through this initiative, ORCA will serve approximately 306 primary Trust Beneficiaries and 424 secondary beneficiaries (family members and caregivers). Expected outcomes include increased participation, improved mental and physical wellbeing, stronger social connections, enhanced employment readiness, and greater long-term independence for Trust Beneficiaries throughout Southeast Alaska.

## **Grantee Proposed Evaluation Measures (from grant application)**

To evaluate the success of the ORCA Training, Travel, and Scholarship Initiative, we will use a combination of quantitative and qualitative measures that reflect both the reach of the project and its impact on Beneficiaries. A breakdown of how we will measure success is below:

### 1. How much did we do?

We will track the number of staff who receive certifications or advanced training, the number of trainings completed, and the number of Beneficiaries who participate in programs supported by these trainings or scholarships. We will also document the quantity and type of recreation and Pre-Employment Transition Services activities delivered across Southeast Alaska.

### 2. How well did we do?

We will measure the quality of implementation by tracking staff competency and confidence before and after trainings, the percentage of staff who complete certifications, and improvements in program safety and instructional consistency. We will also gather Beneficiary and caregiver feedback on program satisfaction, perceived safety, and overall experience. For scholarship-funded activities, we will track participation rates.

### 3. Is anyone better off?

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To understand impact, we will collect data on Beneficiary skill development and wellbeing. This includes the number and percentage of participants who demonstrate growth in recreation-specific skills (i.e. paddling, communication, teamwork), increased community engagement, or progress toward employment-related goals. We will also document individual outcomes such as increased confidence, new social connections, and greater participation in community life. For youth receiving Pre-Employment Transition Services, we will track improvements in soft skills and readiness for future employment pathways.

Together, these measures will help us understand not only the scale of what we accomplished, but also the quality of our work and the tangible benefits experienced by Trust Beneficiaries.

## **Proposed Project Performance Measures (developed by the Trust)**

How much did you do?

- a. Total number (#) of staff trained during the grant reporting period.
- b. Total number (#) of unduplicated participants (primary and secondary Trust beneficiaries) served during the grant reporting period, broken down by Trust beneficiary category.
- c. Total number (#) of Trust beneficiaries receiving scholarships during the grant reporting period, broken down by primary beneficiary category.

How well did you do it?

- a. Provide a narrative describing the timeline, activities, successes, challenges, and any lessons learned during the project reporting period.
- b. Number (#) and percentage (%) of staff receiving certifications or advanced training during the reporting period. Please indicate the name of the certification or training received for each staff member during the reporting period.
- c. Number (#) and percentage (%) of participants who were overall satisfied with their experience while participating in the ORCA program.
- d. Number (#) and percentage (%) of participants who felt safe during their experience with the ORCA program.

Is anyone better off?

- a. Number (#) and percentage (%) of participants who demonstrated growth in recreation-specific skills (i.e., paddling, communication, teamwork), increased community engagement, or progress towards employment goals.
- b. Number (#) and percentage (%) of participants who increased their confidence as a result of participating in the ORCA program.
- c. Number (#) and percentage (%) of participants who formed new social connections as a result of participating in the ORCA program.
- d. Number (#) and percentage (%) of youth receiving Pre-Employment Transition Services who made improvements in their soft skills and readiness for future employment pathways.

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- e. Two statements from participants that describe how the ORCA program impacted their quality of life.

## **Sustainability (from grant application)**

The ORCA Training, Travel, and Scholarship Initiative for Beneficiary Wellbeing builds long-term capacity that will continue benefiting Trust Beneficiaries well beyond the funding period. Many of the requested trainings are one-time certifications that allow ORCA staff to train future staff locally, and reduce costs while ensuring a consistently skilled workforce. This train-the-trainer model ensures that Beneficiaries will continue to receive safe, inclusive programming for years to come.

Ongoing program delivery will be sustained through ORCA’s braided funding model, including municipal and federal grants, community fundraising, and fee-for-service partnerships with the Division of Vocational Rehabilitation. Trust funding strengthens ORCA’s foundation by ensuring Beneficiaries continue to access high-quality recreation and employment preparation opportunities without interruption.

## **Who We Serve (from grant application)**

The ORCA Training, Travel, and Scholarship Initiative is designed specifically to support Trust Beneficiaries, as they make up the majority of ORCA’s participant base across Southeast Alaska. ORCA serves individuals with intellectual and developmental disabilities, individuals experiencing mental illness, people living with traumatic and acquired brain injuries, and youth who benefit from additional support in skill-building and community connection. These groups are our direct focus.

Beneficiaries will be better off through expanded scholarships, as scholarships will reduce financial barriers and ensure that all participants, regardless of income, can access the same high-quality programs, community activities, and employment-focused camps as their peers. For many individuals, these programs create critical pathways toward increased independence, stronger social networks, and improved mental well-being.

By investing in high-quality staff training and certification, ORCA is building a stronger foundation for safe, meaningful, and inclusive recreation and Pre-Employment Transition Services. When staff have the advanced skills and confidence needed to facilitate challenging outdoor activities, Beneficiaries can participate in experiences that are typically out of reach such as ocean kayaking, adaptive snowsports, ropes course programming, and multi-day skill-building camps. These opportunities support not only physical health, but also communication, teamwork, problem-solving, and emotional regulation.

Overall, the ORCA Training, Travel, and Scholarship Initiative strengthens ORCA’s ability to offer safe, consistent, and impactful programming that directly aligns with the Trust’s priorities: increasing community participation, improving quality of life, supporting skill development, and promoting long-term wellness for Trust Beneficiaries throughout Southeast Alaska.

## **Estimated Numbers of Beneficiaries Served Experiencing (from grant application)**

Mental Illness:	82
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Developmental Disabilities:	186
Traumatic Brain Injuries:	38
Secondary Beneficiaries (family members or caregivers providing support to primary beneficiaries):	424
Number of people to be trained	12

## **Project Budget (from grant application)**

Personnel Services Costs	\$0.00
Personnel Services Costs (Other Sources)	\$898,661.40
Personnel Services Narrative	The ORCA Training, Travel, and Scholarship Initiative will be implemented by ORCA’s existing program staff, whose salaries and benefits are fully supported through other funding sources. No personnel costs are requested from this grant. While not charged to the Trust, these staff play a critical role in ensuring that Trust Beneficiaries receive safe, inclusive, and consistent recreation and employment programming. Their expertise directly supports Beneficiary safety, engagement, and long-term outcomes.

Travel Costs	\$35,572.00
Travel Costs (Other Sources)	\$23,505.00
Travel Costs Narrative	<p>Travel is essential to ensuring Trust Beneficiaries across Southeast Alaska can access high-quality, safe, and inclusive programming. Because many rural communities lack local training providers and adaptive recreation infrastructure, staff travel is required both for certification and for direct program delivery.</p> <p>Southeast Alaska Program Travel - \$11,096 This funding supports staff travel to deliver ORCA programming directly within Southeast Alaska communities. Expenses include transportation, lodging, and meals for site visits, outreach, and program facilitation. This travel allows Trust Beneficiaries in rural and underserved areas to access recreation and Pre-Employment Transition Services that would otherwise be unavailable. Without regional travel, many individuals would remain isolated and unable to participate in community-based activities that promote mental health, social connection, and independence.</p> <p>Staff Training Travel – \$24,476 This funding supports staff travel to attend professional development and certification programs that are not available</p>

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	<p>locally. These trainings are required to safely facilitate adaptive outdoor activities and maintain national best practices. All travel directly enhances program quality and Beneficiary safety. Staff return to Southeast Alaska with advanced skills that allow Trust Beneficiaries to participate in activities such as ocean kayaking, adaptive snowsports, ropes courses, and remote outdoor experiences.</p> <p>Staff Training Travel Breakdown:          All ORCA/Employment Training Travel – \$3,746          Association for Challenge Course Technology (ACCT) Course Manager – \$3,680          Cold Water Immersion – \$2,312          Wilderness Medicine – \$1,606          American Canoe Association Trainer – \$1,123          ACCT National Conference – \$4,950          Breckenridge Adaptive Snowsports Training – \$5,339          NOLS Risk Management Conference – \$1,720</p> <p>Total Trust funded Travel Costs: \$35,572</p> <p>These travel investments directly translate into safer programs, higher participation, and expanded access for Trust Beneficiaries.</p>
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Space or Facilities Costs	\$0.00
Space or Facilities Costs (Other Sources)	\$0.00
Space or Facilities Narrative	<p>N/A – Our Space/Facilities costs are captured in our agency's federal indirect cost rate and are not reflected in this budget. All project activities will take place in ORCA's existing offices and program facilities, which are already secured and supported through organizational operating funds. No facilities costs are requested from this grant. These existing spaces provide safe, accessible environments where Trust Beneficiaries engage in group programming, skill-building, and community connection.</p>

Supplies Costs	\$0.00
Supplies Costs (Other Sources)	\$0.00
Supplies Narrative	<p>The ORCA Training, Travel, and Scholarship Initiative will utilize existing program supplies maintained through other funding sources. No supplies are requested from this grant. These supplies enable consistent program delivery and ensure Beneficiaries have the adaptive tools and materials needed to participate fully.</p>

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Equipment Costs	\$0.00
Equipment Costs (Other Sources)	\$35,500.00
Equipment Narrative	All required adaptive and outdoor recreation equipment is already owned and maintained by ORCA through other funding sources. No equipment purchases are requested from this grant. This existing equipment allows Trust Beneficiaries to safely access experiences such as kayaking, biking, skiing, and a ropes course that are rarely available to individuals with disabilities.

Other Costs	\$39,428.00
Other Costs (Other Sources)	\$12,000.00
Other Costs Narrative	<p>To continue delivering safe, inclusive, and high-quality recreation and employment programming, ORCA must invest in comprehensive staff training and participant scholarships. These costs are central to Beneficiary wellbeing and directly impact program accessibility, safety, and long-term outcomes.</p> <p><b>Staff Training Costs – \$19,428</b>          These certifications ensure staff are fully prepared to support Trust Beneficiaries in physically demanding and remote environments. Each training increases staff capacity to deliver trauma-informed, adaptive, and inclusive programming. A breakdown of overall staff training costs are as follows:</p> <ul style="list-style-type: none"> <li>--All ORCA/Employment Training – \$1,314              Ensures consistent facilitation standards, youth engagement strategies, and disability-inclusive practices across all sites.</li> <li>--ACCT Course Manager – \$2,000              Allows safe operation of ORCA’s accessible ropes course, enabling Beneficiaries to build confidence, teamwork, and leadership.</li> <li>--Cold Water Immersion – \$3,000              Critical safety training for kayaking programs in Southeast Alaska’s cold-water conditions.</li> <li>--Wilderness Medicine – \$1,650              Equips staff to respond to medical emergencies in remote settings.</li> <li>--American Canoe Association Trainer – \$1,800              Creates internal trainers who multiply long-term impact by training future staff.</li> <li>--PSIA Adaptive Certification – \$2,650              Ensures safe and inclusive adaptive snowsports instruction.</li> <li>--ACCT National Conference – \$2,560              Keeps staff aligned with national safety standards and best practices.</li> <li>--Breckenridge Adaptive Ski Training – \$3,654</li> </ul>

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	<p>Builds advanced capacity to support participants with complex needs.          --NOLS Risk Management Conference – \$800          Strengthens organizational safety systems and emergency planning.</p> <p>These trainings directly allow Trust Beneficiaries to safely access experiences that build independence, resilience, physical health, and social confidence.</p> <p>Participant Scholarships – \$20,000          Scholarships ensure that financial barriers never prevent Trust Beneficiaries from participating in ORCA programs. Funds cover participant fees, materials, transportation, and other direct costs.          These scholarships:          --Expand access for low-income individuals          --Increase participation across rural communities          --Promote equity and inclusion          --Reduce isolation and improve mental health          --Support employment readiness and independence          For many Beneficiaries, scholarships are the difference between continued isolation and meaningful community participation.</p> <p>All listed costs directly support safer programs, higher participation, stronger staff capacity, and improved quality of life for Trust Beneficiaries. These investments ensure individuals with disabilities across Southeast Alaska can access inclusive recreation, build essential life and employment skills, and experience greater independence, confidence, and community belonging.</p>
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## **Other Funding Sources (from grant application)**

Juneau Community Foundation - PENDING	\$160,000.00
City and Borough of Juneau Youth Activities Grant - PENDING	\$15,000.00
Peace Health - PENDING	\$15,000.00
Ketchikan Community Foundation - PENDING	\$7,000.00
Pathways to Partnerships Grant - SECURED	\$366,588.00
Ketchikan Borough - PENDING	\$18,000.00
Administration for Community Living - SECURED	\$121,334.65

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Centers for Independent Living Grant - SECURED	\$155,020.00
Discretionary Funds - PENDING	\$111,723.75
<b>Total Leveraged Funds</b>	<b>\$969,666.40</b>