

HOPE COMMUNITY SERVICES, INC.

MEETING OF THE BOARD OF DIRECTORS

October 24, 2024, at 5:30 p.m.

6100 S. Walker Ave., OKC, OK 73139

I. WELCOME	Walter	1	
II. MINUTES			
A. August 22, 2024 Minutes	Walter	2	Approve
III. BOARD MEMBER RESIGNATION			
A. Sunny Wenger	Walter	3	Accept
IV. BOARD MEMBER APPLICATION			
A. Gabriela Rodriguez	Walter	4	Approve
V. BOARD MEMBER APPOINTMENTS			
A. President	Walter	5	Approve
B. Secretary/Treasurer	Walter	6	Approve
VI. FINANCIAL BUSINESS			
A. Financial Update	Kyle	7	Info Only
B. FY'24 Fixed Rate Contract Amendment Closeout	Heather	8	Approve
C. FY'24 Sole Source Contract Amendment	Heather	9	Approve
1. Medication/Flex – SOS Grant – Federal (Closeout) \$387.95			
2. Medication/Flex – SOS Grant – Federal - \$37,534.59			
D. FY'25 Fixed Rate Contract Amendment	Heather	10	Approve
1. SA General Population – SOS III Grant – Federal (Oct-June) - \$41,250.00			
E. FY'25 Sole Source Contract Amendment	Heather	11	Approve
1. Flex Funds – Housing – State - \$2,000.00			
2. Flex Funds – Housing – State - \$150.00			
3. Medication/Flex – SOS III Grant – Federal (Oct-June) - \$82,500.00			
4. Flex Funds – Housing – State - \$1,000.00			
5. Flex Funds – Housing – State - \$2,145.58			
VII. NEW BUSINESS			
A. Policy and Procedure Update - 4.20.00 Commitments, Contingencies, and Compliance Policy (403(B)	Shelley	12	Approve
B. Bid for 416 duct work	Michael	13	Approve
C. 2025 Holiday Schedule	Ashley	14	Approve
D. 2025 Board of Directors Schedule	Ashley	15	Approve
VIII. CEO REPORT	Heather		Info Only
IX. CITIZENS TO BE HEARD			

Next Board Meeting: Thursday, January 23, 2025, at 5:30pm

Please RSVP (405-510-3757) by noon Wednesday, January 22, 2025

HOPE COMMUNITY SERVICES, INC.
BOARD OF DIRECTORS MEETING MINUTES

August 22, 2024, at 5:30 p.m.
6100 S. Walker Avenue
Oklahoma City, OK 73139

MEMBERS PRESENT:

Walter Long	Earlene Bieger	Steve Rice
Sherry Read	Miguel Troncoso	Sunny Wenger
Andrea Grayson		

MEMBERS ABSENT:

Vernel Ross-Mullin	Kimberley Walker
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STAFF PRESENT:

Heather Helberg	Billy Ray	Robert Scott
Kyle Karfonta	Lisa Webb	Shane Martin
Danielle Smith	Alma Rhone-Edwards	Tanner Daniel
Kristi Paul	Brenda Werner	Kirsten Cowell
DeAnna Andrews	Ashley Luginbill	

Walter Long welcomed everyone and called the meeting to order at 5:31 p.m.

Walter Long asked the board to review the June 27, 2024 minutes. Steve Rice made a motion to approve the minutes, Miguel Troncoso seconded the motion. Motion passed by unanimous vote.

Kyle Karfonta stated the FY'23 audit is coming to conclusion, the auditors came out to test Medicaid revenue and review awards, everything seems to be going well, feedback has been positive. The audit should be finalized by the end of September. The FY'24 audit will begin in October. Hopefully by the October meeting we will have the formal audit report. Although, due to the audit we do not have financial reports at this time.

Heather Helberg presented the FY'25 Fixed Rate Contract Amendment - Criminal Justice - Veterans Court Treatment – State with the amended amount being \$55,000.00. HOPE has been asked by the Department of Mental Health to participate in Veterans Court, which has roughly 15-25 clients. Mrs. Helberg also presented the FY'25 Sole Source Contract Amendment – Flex Funds – Housing – State with the amended amount being \$1,200.00, HOPE has been spending well and was awarded more funds. Miguel Troncoso made a motion to approve the FY'25 Contract Amendments, Sherry Read seconded the motion. Motion passed by unanimous vote.

Heather Helberg stated the sale of 4720 South Shields Boulevard has been completed. We listed the property on a Friday and by Monday we had four offers. The final offer was \$20,000 above the asking

price. We have moved the transportation and maintenance teams to the 6100 S. Walker location and plan to use the funds from the sale to build a new bus barn and maintenance office. Miguel Troncoso attending the closing with Mrs. Helberg. The new owners will turn the property into a car lot and a mechanic shop.

Heather Helberg presented the Section 3.11.01 Paid Time Off Policy and Procedure update, which now has HOPE's Wellness Days policy that gives every employee, excluding URC staff, one Friday off every month. Mrs. Helberg also presented the Section 3.27.04 Office Furniture Policy and Procedure update, which states employees should not bring in personal furniture but if an item is needed to enhance their workspace it will need to be reviewed by the Chief Clinical Director. Steve Rice made a motion to approve the Section 3 Policy and Procedure updates, Andrea Grayson seconded the motion. Motion passed unanimously.

Heather Helberg presented changing the Board of Directors meeting schedule for 2025; to not overload the meetings and requiring the assistance of the different committees in between meetings, we are requesting six meetings a year, January, March, May, July, September, and November. This will be voted on at the October Board of Directors meeting.

Miguel Troncoso presented three responses to HOPE's Family URC RFP bids: DIAK Architects, RAD Collaborative, and Redland Childers Architects. Mr. Troncoso would like the Board to move forward with interviewing and requesting a fee schedule. The interviewers would need to decide how to go about the interview process and who would want to be included. Mr. Troncoso has worked with the three before and has a good relationship with them. HOPE plans to do some fundraising to help with the cost of the project. Sherry Read made a motion to move forward with the interviewing process, Earlene Bieger seconded the motion. Motion passed by unanimous vote.

Heather Helberg reviewed the CEO report. Melanie Johnson and Mrs. Helberg went to Nashville to look at the behavioral health center at their jail. They will help create policy and procedures. HOPE was approached by Healthy Minds and asked to speak with other non-profit organizations about being a CCBHC.

HOPE was quoted in the report from National Council, the President of the Council emailed Mrs. Helberg, they had a meeting, this may lead to some media exposure for HOPE.

We are still waiting to hear about the BISS Mid-Del contract, and the ARPA projects, they've started awarding ARPA contracts in District One, but we are in District Two. We are also awaiting notifications from Inasmuch, Everyone Deserves Access, US Probation for treatment services for aftercare after prison, and the OKC Community Foundation for Aging Services.

HOPE was asked by the Department of Mental Health to expand our mobile crisis in OK county, we may need to add some staff to accommodate.

Great Plains accounting software will be in end of life in 2028. We should start looking now for new software. We've consulted with Eide Bailly, we wouldn't make the switch until FY'26.

Variety Care and Northcare have merged, they've sold their portion of HOPE Pharmacy to Virgil Todd, we are now 50/50 owners with Mr. Todd. We will need our Board Members to complete some trainings for the Pharmacy as well as providing information to run background checks.

Proceeds from the sale of the Shields property will go towards building a bus barn and maintenance office behind the 6100 S. Walker property. Mr. Troncoso will help with this process.

Events attend by Hope staff - Crisis collaboration meeting, Indian clinic 50th year event, Spin City outreach event, lunch with the Governor, breakfast with the sheriff, and breakfast with the OKC

Superintendent all at the South Chamber of Commerce. Tour of Valley Community Hospital, and toured Cedar Ridge Hospital.

No citizens were heard or present.

Walter Long adjourned the meeting at 6:14 pm.

SUBMITTED:

Vernel Ross-Mullin, Secretary and Treasurer



Board Member Application

Date: 8/27/2024

Welcome and thank you for your interest in becoming a member of our Board of Directors at HOPE Community Services, Inc. (HOPE). Volunteering your time for a non-profit community mental health center can be a very rewarding experience. Every day we make a difference in the lives of so many, and we are excited to have your valuable expertise in helping us to do this.

We appreciate you taking the time to complete this application and providing important information about yourself. This application will be reviewed by members of our Senior Management Team, as well as our current members of our board.

Name: Gabriela Rodriguez

Address: [REDACTED] City Oklahoma City State OK Zip [REDACTED]

Email: [REDACTED]

Home Phone: [REDACTED] Cell Phone: [REDACTED]

Place of Employment: Trinity Church of the Nazarene

Position: Lead Pastor Work Phone: 405-632-3307

Education: Multi-disciplinary Bachelor's degree from Southern Nazarene University (psychology, theology, Spanish) in 2000; Masters of Divinity Degree from Nazarene Theological Seminary in 2008; Doctor of Ministry degree from Nazarene Theological Seminary in 2022.

Work History (or attach resume): I have been a Pastor at Trinity Church of the Nazarene in various positions since April 2005-present

Professional Organizations and Memberships: _____

Volunteer Activities (Past or Present): missions work (various short term opportunities), community outreach work with homeless community through partnership with Refresh Shower Ministry, addiction recovery work in connection with Jordan's Crossing.

Hobbies or Special Interests: reading, hiking, spending time with family and friends, playing board games.

Special Interest in Mental Health, Addiction, Homelessness, Youth/Elderly Service: I desire all people to receive the help that they need in order to live a better quality of life. In our local community I daily see the effect that mental health plays in our unhoused neighbors. I long to be part of the solution. I believe that religious organizations working alongside community service agencies can be a powerful link that can make a big difference in our communities.

How did you learn about HOPE Community Services, Inc. ? some of our church members work at HOPE.

Why do you wish to join the Board of Directors? I would like to be a part of HOPE because I know it is an organization that is doing amazing work in our community and contributing to the solution rather than to the problem of homelessness. What I know and have heard about HOPE gives me lots of HOPE (no pun intended ☺) about long term solutions that can bring about holistic healing and solutions to people. I would like to be a part of this organization and find ways to partner together for greater good in our community.

If you become a member of HOPE's Board of Directors, you agree that you will be able to provide at least 2-4 hours every two months in attendance to Board and Committee meetings, and that you do not have any conflict-of-interest in participating on the Board.

Applicant's Signature: _____



Date: _____

8/27/24

We are excited at the possibility of having you as a Board Member. We will be contacting you shortly at which time you will meet with our Senior Management where we can share more information about HOPE as well as learn more about you.

If you should need any additional information, please feel free to contact me. Thank you for your application.

Ashley Luginbill
Administrative Officer
405-510-3757



SERVICES WITHIN REACH

Allie Friesen | Commissioner

Kevin Stitt | Governor

**To: Heather G. Helberg, Executive Director
HOPE Community Services, Inc.**

**Re: FY24 Sole Source Contract Amendment
PO # 4529067845**

Date: July 3, 2024

The Oklahoma Department of Mental Health and Substance Abuse Services amends your FY24 contract by a total of **\$387.95**.

Contract Line	CFDA	SOW http://www.odmhsas.org/arc.htm	Amendment Amount	FY24 Total Contract Amount
Medication/Flex - SOS Grant - Federal (Closeout)	937880000	Flex Funds	\$387.95	\$147,922.54

The changes to your contract are as follows:

Section IV (Compensation), subsection A for a total of **\$387.95** with appropriate adjustments to the applicable sections.

This amendment should be made a part of your contract.

Please indicate your acceptance of these conditions by your approval at your earliest convenience.

Thank you,

Bryan Wiewel

Bryan Wiewel, CPO
Contract Officer III

Ecrw 20179



SERVICES WITHIN REACH

**To: Heather G. Høberg, Executive Director
HOPE Community Services, Inc.**

**Re: FY24 Fixed Rate Contract Amendment
PO 4529066295**

Date: October 9, 2024

The Oklahoma Department of Mental Health and Substance Abuse Services amends your FY24 contract by a total of **\$425,142.78**.

Contract Line	CS	CFDA #	SOW http://www.odmhsas.org/arc.htm	Amendment Amount	FY24 Total Contract Amount
Recovery Support - Projects for Assistance in Transition from Homelessness (PATH) - Federal (Closeout)	25AA	931500000	same	(\$58,681.99)	\$9,750.01
SOC - Behavioral Intervention Services in Schools (BISS) - State (Closeout)	42BA	n/a	same	(\$887.98)	\$3,112.02
Child, Youth, Young Adults & Families - Family Self-Sufficiency Program - State (Closeout)	55AB	n/a	same	(\$71,635.00)	\$35,365.00
Gambling - Revolving (Closeout)	70AA	n/a	same	(\$10,000.00)	\$0.00
Basic Services - State (19401/2003010)(Closeout)	01AA	n/a	same	\$370,074.52	\$370,074.52
SA General Population - State (19401/3003010)(Closeout)	02AA	n/a	same	\$159,674.90	\$159,674.90
SA General Population - SABG - Federal (Closeout)	02AA	939590001	same	\$5,685.23	\$180,685.23
Recovery Support - Community Living - Supported Transitional Housing - MHBG - Federal (Closeout)	42AL	939580000	same	\$2,267.50	\$572,267.50
Criminal Justice - Mental Health Court Treatment - State (Closeout)	45AA	n/a	same	\$2,143.33	\$87,143.33
Criminal Justice - Drug Court Treatment - Adult - State (Closeout)	90AA	n/a	same	\$26,502.27	\$201,502.27



SERVICES WITHIN REACH

Allie Friesen | Commissioner

Kevin Stitt | Governor

The changes to your contract are as follows:

Section IV (Compensation), subsection A for a total of **\$425,142.78** with appropriate adjustments to the applicable sections.

This amendment should be made a part of your contract.

Please work all fixed rate denied claims after each pended run. Pended services run on the first Saturday of February, May, July, August, and November. If you have any questions related to the pended runs, please reach out to the PICIS HelpDesk: 405-248-9326 or email gethelp@odmhsas.org.

Please indicate your acceptance of these conditions by your approval at your earliest convenience.

Thank you,

Bryan Wiewel

Bryan Wiewel, CPO
Contract Officer III

ecrw 20274



ADDRESS
2000 N Classen Blvd.
Oklahoma City, OK 73106
Ste. 2-600



PHONE
1 (800) 522-9054



WEBSITE
oklahoma.gov/odmhsas

To: Heather G. Helberg, Executive Director
HOPE Community Services, Inc.

Re: FY25 Fixed Rate Contract Amendment
PO # 4529067545

Date: October 8, 2024

The Oklahoma Department of Mental Health and Substance Abuse Services amends your FY24 contract by a total of \$41,250.00.

Contract Line	CS	CFDA #	SOW http://www.odmhsas.org/arc.htm	Amendment Amount	FY25 Total Contract Amount
SA General Population - SOS III Grant - Federal (Oct-June)	02AA	937880000	Same	\$41,250.00	\$41,250.00

The changes to your contract are as follows:

Section IV (Compensation), subsection A for a total of \$41,250.00 with appropriate adjustments to the applicable sections.

This amendment should be made a part of your contract.

Please work all fixed rate denied claims after each pended run. Pended services run on the first Saturday of February, May, July, August, and November. If you have any questions related to the pended runs, please reach out to the PICIS HelpDesk: 405-248-9326 or email gethelp@odmhsas.org.

Please indicate your acceptance of these conditions by your approval at your earliest convenience.

Thank you,

LaToya Mitchell

LaToya Mitchell, CPO
Contract Officer III

**ADDRESS**

2000 N Classen Blvd.
Oklahoma City, OK 73106
Ste. 2-600

**PHONE**

1 (800) 522-9054

**WEBSITE**

oklahoma.gov/odmhsas



SERVICES WITHIN REACH

Allie Friesen | Commissioner

Kevin Stitt | Governor

**To: Heather G. Helberg, Executive Director
HOPE Community Services, Inc.**

**Re: FY25 Sole Source Contract Amendment
PO # 4529067845**

Date: August 30, 2024

The Oklahoma Department of Mental Health and Substance Abuse Services amends your FY25 contract by a total of **\$2,000.00**.

Contract Line	CFDA	SOW http://www.odmhsas.org/arc.htm	Amendment Amount	FY25 Total Contract Amount
Flex Funds - Housing - State	n/a	Same	\$2,000.00	\$136,750.00

The changes to your contract are as follows:

Section IV (Compensation), subsection A for a total of **\$2,000.00** with appropriate adjustments to the applicable sections.

This amendment should be made a part of your contract.

Please indicate your acceptance of these conditions by your approval at your earliest convenience.

Thank you,

Bryan Wiewel

Bryan Wiewel, CPO
Contract Officer III

Ecrw 20111



**To: Heather G. Helberg, Executive Director
HOPE Community Services, Inc.**

**Re: FY25 Sole Source Contract Amendment
PO # 4529067845**

Date: September 19, 2024

The Oklahoma Department of Mental Health and Substance Abuse Services amends your FY25 contract by a total of **\$150.00**.

Contract Line	CFDA	SOW http://www.odmhsas.org/arc.htm	Amendment Amount	FY25 Total Contract Amount
Flex Funds - Housing - State	n/a	Same	\$150.00	\$136,900.00

The changes to your contract are as follows:

Section IV (Compensation), subsection A for a total of **\$150.00** with appropriate adjustments to the applicable sections.

This amendment should be made a part of your contract.

Please indicate your acceptance of these conditions by your approval at your earliest convenience.

Thank you,

LaToya Mitchell

LaToya Mitchell, CPO
Contract Officer III

Ecrw 20156



ADDRESS

2000 N Classen Blvd, Ste 2-600
Oklahoma City, OK 73106



PHONE

1 (800) 522-9054



WEBSITE

oklahoma.gov/odmhsas

**To: Heather G. Helberg, Executive Director
HOPE Community Services, Inc.**

**Re: FY25 Sole Source Contract Amendment
PO # 4529067845**

Date: October 9, 2024

The Oklahoma Department of Mental Health and Substance Abuse Services amends your FY25 contract by a total of **\$82,500.00**.

Contract Line	CFDA	SOW http://www.odmhsas.org/arc.htm	Amendment Amount	FY25 Total Contract Amount
Medication/Flex - SOS III Grant - Federal (Oct-June)	937880000	Same	\$82,500.00	\$82,500.00

The changes to your contract are as follows:

Section IV (Compensation), subsection A for a total of **\$82,500.00** with appropriate adjustments to the applicable sections.

This amendment should be made a part of your contract.

Please indicate your acceptance of these conditions by your approval at your earliest convenience.

Thank you,

LaToya Mitchell

LaToya Mitchell, CPO
Contract Officer III

Ecrw 20247



SERVICES WITHIN REACH

Allie Friesen | Commissioner

Kevin Stitt | Governor

**To: Heather G. Helberg, Executive Director
HOPE Community Services, Inc.**

**Re: FY25 Sole Source Contract Amendment
PO # 4529067845**

Date: October 9, 2024

The Oklahoma Department of Mental Health and Substance Abuse Services amends your FY25 contract by a total of **\$1,000.00**.

Contract Line	CFDA	SOW http://www.odmhsas.org/arc.htm	Amendment Amount	FY25 Total Contract Amount
Flex Funds - Housing - State	n/a	Same	\$1,000.00	\$137,900.00

The changes to your contract are as follows:

Section IV (Compensation), subsection A for a total of **\$1,000.00** with appropriate adjustments to the applicable sections.

This amendment should be made a part of your contract.

Please indicate your acceptance of these conditions by your approval at your earliest convenience.

Thank you,

Bryan Wiewel

Bryan Wiewel, CPO
Contract Officer III

Ecrw 20375

**To: Heather G. Helberg, Executive Director
HOPE Community Services, Inc.**

**Re: FY25 Sole Source Contract Amendment
PO # 4529067845**

Date: October 23, 2024

The Oklahoma Department of Mental Health and Substance Abuse Services amends your FY25 contract by a total of **\$2,145.58**.

Contract Line	CFDA	SOW http://www.odmhsas.org/arc.htm	Amendment Amount	FY25 Total Contract Amount
Flex Funds - Housing - State	n/a	Same	\$2,145.58	\$140,045.58

The changes to your contract are as follows:

Section IV (Compensation), subsection A for a total of **\$2,145.58** with appropriate adjustments to the applicable sections.

This amendment should be made a part of your contract.

Please indicate your acceptance of these conditions by your approval at your earliest convenience.

Thank you,

LaToya Mitchell

LaToya Mitchell, CPO
Contract Officer III

Ecrw 20414

4.20.00 COMMITMENTS, CONTINGENCIES, AND COMPLIANCE

POLICY (403(B))

This policy outlines the process for identifying, evaluating, and accounting for commitments, contingencies, and potential litigation. It ensures compliance with applicable laws and regulations and facilitates accurate reporting and disclosures related to claims and loss contingencies.

This policy applies to management and relevant staff responsible for monitoring compliance with legal obligations, overseeing litigation, and addressing claims that could impact the organization financially or reputationally.

POLICY FOR IDENTIFYING COMMITMENTS AND CONTINGENCIES

The CHRO and CFO, in collaboration with outside legal counsel when necessary, regularly review the company's activities to identify potential commitments and contingencies that could lead to claims or legal action.

Periodic inquiries are made with key stakeholders to ensure that all potential legal risks, claims, or obligations are identified.

EVALUATION PROCESS FOR LITIGATION, CLAIMS, AND LOSS CONTINGENCIES

Once a potential litigation or claim is identified, CHRO and CFO assesses the nature, likelihood, and impact of the claim seeking legal consultation when warranted.

Claims are categorized based on severity (low, moderate, high) and likelihood (remote, possible, probable). This evaluation includes determining the financial impact and potential disclosure requirements.

A record of all litigation, claims, and loss contingencies is maintained, with documentation of assessments and decisions related to each case.

COMPLIANCE WITH LAWS AND REGULATIONS

The organization regularly reviews applicable local, state, and federal laws to ensure ongoing compliance. Changes to laws or regulations are promptly addressed through updates to internal policies and staff training.

Internal audits and reviews are conducted annually to verify that all compliance-related procedures are being followed, and new or updated regulations are implemented effectively.

Staff involved in compliance, legal, and financial reporting receive ongoing training to stay updated on relevant laws and best practices for reporting and managing claims and contingencies.

ACCOUNTING AND REPORTING PROCESS

If a loss contingency is deemed probable and can be reasonably estimated, the financial team records the liability in the financial statements in accordance with generally accepted accounting principles.

For all significant legal claims or contingencies, appropriate disclosures are made in the financial statements in order to provide transparency to stakeholders.

Litigation and claims are monitored throughout the year, with updates provided to the financial team to ensure accurate reporting in interim and annual financial statements.



Mechanical &Electrical Proposal

Hope Community Services
416 SW 79th
OKC, OK

Add dampers in supply ductwork throughout building so air can be balanced from office to office. Adjust return ductwork and add return ductwork to get proper return to systems. Add additional supply and return grills to front client entry. Add exhaust fans in restrooms to meet code requirements, to be vented outdoors in rear of building. Adjust air devices with on each system to verify all grills have proper air flow.

\$23360.00

The above work to be performed in accordance with specifications submitted for above work and completed in a workmanlike manner, with payment due upon completion, for the sum of:

Priced Above.

Any alteration from above specification involving extra costs will be executed upon verbal request by authorized personnel and will be considered an extra charge over and above the estimate(s). Owner to carry fire, tornado, and other required insurance. Catalyst Mechanical & Electrical LLC to carry Workers Compensation and General Liability. Customer understands that all prices quoted are considered normal working conditions and any problems encountered after work begins may result in additional charges.

Signature _____ Date _____

Print _____ Title _____



Date: 10/17/2024

Proposal Number: Q-2402001

Bill To:

HOPE Community Services
416 Southwest 79th Street
Oklahoma City, Oklahoma 73139

Property:

HOPE Community Services
416 Southwest 79th Street
Oklahoma City, Oklahoma 73139

Jackson Mechanical Service is pleased to provide you with the following quote for labor and materials to relocate return air out of south restrooms and install exhaust fans in south restrooms. Install two (2) new air supplies and one (1) return duct in Lobby. All work to be performed on regular time, during regular working hours. Should work be required on the weekend, or after hours, an adjusted quote can be provided.

SCOPE OF WORK

- Order materials
- Travel to site
- Relocate four (4) Return Air Distribution Devices out of South Restrooms into Hallway
- Ductwork as needed to Relocate Return Air Distribution Devices
- Furnish and install Exhaust Fans in South Restrooms
- Ductwork – Exhaust from Exhaust fans out the roof in South Restrooms
- Furnish and install Exhaust Roof Flashings and Caps for South Restrooms Exhaust Fans
- Furnish and install Air Distribution Devices in Lobby (1 Sidewall Supply, 1 Lay Return)
- Reuse Existing Side Wall Supply Air Distribution Device in Lobby
- Ductwork – Supply and Return from 3 ton Unit to Lobby Air Distribution Devices
- Demolition and Cap of Supply Duct to existing Lobby Air Distribution Device
- Clean-up and check out with customer

The following item(s) are not included as part of this proposal:

- Items other than described.
- Repairs beyond the listed scope if required will be identified and approved prior to completion.
- Asbestos removal or encapsulation if found
- Seismic Bracing
- Overtime hours
- Air balancing
- Roofing replacement/repairs
- Existing code violations

OUR PRICE FOR THIS PROPOSAL IS\$12,500.00

Jackson Mechanical Service, Inc. terms and conditions apply. Additional work that may be required or desired will only be performed with your prior knowledge and approval. This price is good for 30 days and must be revisited if this proposal is not accepted within that time. Thank you again for this opportunity to work with you. Please call me should you have any questions or wish to discuss this proposal further.

Contractor

Buddy Selsor

Signature (Authorized Representative)

Buddy Selsor

Name (Print/ Type)

405.476.5539

Phone

10/17/2024

Date

Q-2402001

Proposal #

Customer

Signature (Authorized Representative)

Name (Print/ Type)

Title

Date

PO#



phone 405.727.5300
fax 479.756.5998
395 NE 31st St
Newcastle, OK 73065
gopaschal.com

PROPOSAL SUMMARY

Customer Name Hope Community Center Phone 405-423-5203 Date 9/26/2024
Address 416 Southwest 79th Street Email ybiking@hopecsi.org
City, State, Zip Oklahoma City, OK 73139 Work Phone(s) _____

Scope of Work	Total Due Upon Completion (Including Taxes)
OPTION 1 <input type="checkbox"/> Includes: • New Supply and Return Ducts for all Systems • --- <i>See Proposal Build Sheet (Page 2) for further details</i> • Equipment Warranty - See Description Below • --- Other Terms: _____	Financing Terms: Downpayment: Loan Amount: or \$47,250
OPTION 2 <input type="checkbox"/> Includes: • Adding Returns to each System • --- <i>See Proposal Build Sheet (Page 2) for further details</i> • Equipment Warranty - See Description Below • --- Other Terms: _____	Financing Terms: Downpayment: Loan Amount: or \$14,650
OPTION 3 <input type="checkbox"/> Includes: • --- • --- <i>See Proposal Build Sheet (Page 2) for further details</i> • --- • --- Other Terms: _____	Financing Terms: Downpayment: Loan Amount: or
OPTION 4 <input type="checkbox"/> Includes: • --- • --- <i>See Proposal Build Sheet (Page 2) for further details</i> • --- • --- Other Terms: _____	Financing Terms: Downpayment: Loan Amount: or

Equipment Warranty Descriptions			
OPTION 1	OPTION 2	OPTION 3	OPTION 4
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---	---	---	---
---	---	---	---

Comments: _____

I/we have read, understand, & accept this proposal in its entirety, including the full Terms and Conditions, and authorize the scope of work detailed in the option(s) selected above:

Acceptance (Customer)

Acceptance (Paschal)

By _____

Date _____

By Caleb Jackson

Date 9/26/2024



phone 405.727.5300
 fax 479.756.5998
 395 NE 31st St
 Newcastle, OK 73065
gopaschal.com

PROPOSAL BUILD SHEET

Customer Name Hope Community Center Phone 405-423-5203 Date 9/26/2024
 Address 416 Southwest 79th Street Email ybuilding@hopecsi.org
 City, State, Zip Oklahoma City, OK 73139 Work Phone(s) _____

	American Standard	American Standard	American Standard	American Standard
	New Supply and Returns	Returns Only	OPTION 3	OPTION 4
Location: <u>OKC</u>				
AC / Heat Pump:				
Cooling Coil/Heat Strips:				
Furnace/Air Handler:				
Thermostat:				
Filtration:				
Indoor Air Quality (IAQ):				
Refrigerant Lines:				
Equipment Pad:				
Plenums:	New Supply & Return Air ✓	New Return Air ✓		
Duct Work:	4 Ton Flex Duct System ✓	3.5-5 Ton Return Air Duct ✓		
Duct Work:	3 Ton Flex Duct System ✓	1.5-3 Ton Return Air Duct ✓		
Flue Vent:				
Basic Electrical:				
Electrical Department:				
Gas Piping:				
Permit & Inspection:	City Permit/Inspect ✓	City Permit/Inspect ✓		
Water Heater:				
Duct Cleaning/Sealing:				
Labor Warranty:				
Misc:	Relocate Thermostats ✓			
Misc:				
Misc:				
Labor:	Labor/Misc. Material - 3 ✓	Labor/Misc. Material - 3 ✓		
Discounts:				
Subtotal:	\$47,250	\$14,650		
Tax:	Oklahoma ✓	Oklahoma ✓		
Total Due Upon Completion	\$47,250	\$14,650		



phone 405.727.5300
 fax 479.756.5998
 395 NE 31st St
 Newcastle, OK 73065
gopaschal.com

ACKNOWLEDGEMENTS

Item	Recommendations & Exclusions
HVAC System Operation	I acknowledge my HVAC system equipment will not be in operation during execution of the agreed-upon scope of work. The requirement and/or necessity for supplemental heating or cooling is at the sole discretion and responsibility of the buyer. Paschal is not responsible for any damages including special, incidental, or consequential damages or losses due to in whole or in part to the absence of heating or cooling related to the HVAC equipment installation process.
Existing Equipment Removal & Haul Away	Unless otherwise indicated in writing, I acknowledge Paschal will remove and haul away my replaced HVAC system equipment during execution of the agreed-upon scope of work.
Warranties	I acknowledge the equipment & labor warranties will become void if I do not continuously maintain a Paschal Protection Plan Membership and schedule the required annual or bi-annual visits without lapse for the duration of the equipment & labor warranty terms.

I/we have read, understand, and acknowledge the recommendations and exclusions stated above.

Buyer's Signature: _____

Date: _____

2025 Holiday Schedule

Wednesday	January 1 st	New Year's Day
Monday	January 20 th	Martin Luther King, Jr. Day
Monday	May 26 th	Memorial Day
Thursday	June 19 th	Juneteenth
Friday	July 4 th	Independence Day
Monday	September 1 st	Labor Day
Tuesday	November 11 th	Veterans Day
Thursday Friday	November 27 th November 28 th	Thanksgiving
Thursday Friday	December 25 th December 26 th	Christmas

2025 Board of Directors Schedule

January 23rd, 2025

March 27, 2024

May 22, 2025

July 24, 2025

September 25, 2025

November 20, 2025