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**2018 S.L. Gimbel  
Foundation Fund Holiday  
Food Program Grant  
Application**

|                    |          |
|--------------------|----------|
| Internal Use Only: |          |
| Grant:             | 20180980 |

**Organization / Agency Information**

|   |                             |  |
|---|-----------------------------|--|
| <b>Organization/Agency Name:</b><br>Community SeniorServ dba SeniorServ |                             |  |
| <b>Physical Address:</b><br>1200 N. Knollwood Circle                    |                             | <b>City/State/Zip</b><br>Anaheim, CA 92801 |
| <b>Mailing Address:</b><br>Same as physical address                     |                             | <b>City/State/Zip</b>                      |
| <b>CEO or Director:</b><br>Holly Hagler                                 |                             | <b>Title:</b><br>President & CEO           |
| <b>Phone:</b><br>714-220-0224   | <b>Fax:</b><br>714-220-1374 | <b>Email:</b><br>hhagler@seniorserv.org    |
| <b>Contact Person:</b><br>Darla Olson                                   |                             | <b>Title:</b><br>VP Advancement            |
| <b>Phone:</b><br>714-229-3362   | <b>Fax:</b><br>714-220-1374 | <b>Email:</b><br>dolson@seniorserv.org     |
| <b>Web Site Address:</b><br>www.seniorserv.org                          |                             | <b>Tax ID:</b><br>95-2771715               |

**Program / Grant Information**

|   |   |   |   |
|---|---|---|---|
| <b>Program/Project Name:</b><br>Meals on Wheels aka Home Delivered Meals  |   | <b>Amount of Grant Requested:</b><br>\$15,000.00  |   |
| <b>Total Organization Budget:</b><br>\$14,119,292   | <b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b><br>90% | <b>Per 990, Percentage of Management &amp; General Expenses Only (Column C / Column A x 100):</b><br>6% | <b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b><br>10% |
| <b>Purpose of Grant Request (one sentence):</b><br>The purpose of this grant is to purchase raw food needed to prepare home delivered meals for homebound older adults residing in Orange County. |   |   |   |
| <b>Gimbel Holiday Grants Received: List Year(s) and Award Amount(s)</b><br>2014 - \$10,500, 2015 - \$10,000, 2016 - \$10,000  |   |   |   |

**Signatures**

|  |                       |                          |
|--|-----------------------|--------------------------|
| <b>Board President / Chair: (Print name and Title)</b><br>Randy Platt, Board Chair           | <b>Signature:</b><br> | <b>Date:</b><br>11/15/18 |
| <b>Executive Director/President: (Print name and Title)</b><br>Holly Hagler, President & CEO | <b>Signature:</b><br> | <b>Date:</b><br>11/15/18 |

**2018 S.L. Gimbel Foundation Fund  
Holiday Grant Application**

Please provide the following information for items I. through III. by answering all questions in ONE PAGE-12 Font. Please be thorough, clear, specific, and concise.

**I. Organization/Agency Background:** State your mission, vision, purpose, and provide a brief history. What are your core programs and activities? How many people do you serve? How many paid staff, full time and part-time? How many volunteers?

Community SeniorServ, doing business as SeniorServ, was founded in 1967. Our mission is to nourish the wellness, purpose, and dignity of seniors and their families in our community. Our vision is a world that honors people throughout life. SeniorServ's core programs include; Meals on Wheels aka home delivered meals; case management and in-home services to homebound seniors; Senior Lunch Café aka congregate meals to seniors in their local senior center; and adult day care services from three locations. SeniorServ provides services to nearly 10,000 unduplicated seniors annually. SeniorServ employs 67 full time staff and 32 part-time staff and we have more than 600 volunteer who support the organization.

**II. Project Information:** Describe your food distribution program. **ANSWER ALL QUESTIONS.** Explain the community need including demographics, geographic characteristics of the area or community to be served, community conditions and income level. What are the specific activities of the food program?

The older adult population is the fastest growing segment of our society. The United States Census Bureau projects the number of seniors will more than double by the year 2060. And locally, that growth will affect Orange County sooner, with the proportion of older adults in Orange County increasing by more than 65 percent over the next 15 years, according to the 2013 Orange County Health Profile. Now add the fact that in October 2016, the *Orange County Older Adult Profile* (a report funded by the *Orange County Health Care Agency*) cited food insecurity as one of the three biggest issues facing older adults in the County. The report indicated that over 22 percent of couples and 44 percent of singles don't have sufficient income for necessities such as food and we potentially have a huge crisis in our community.

A recent study published by *The National Foundation to End Senior Hunger* reported that food insecure seniors "were at higher risk of experiencing negative nutrition and health consequences than food secure seniors." Specifically, seniors at risk of hunger were; 50 percent more likely to be diabetic; twice as likely to report fair or poor general health; three times more likely to suffer from depression; 30 percent more likely to report at least one activities of daily living (ADL) limitation; 14 percent more likely to have high blood pressure; nearly 60 percent more likely to have congestive heart failure or experienced a heart attack; and twice as likely to report having gum disease or have asthma.

SeniorServ's Meals on Wheels program serves the highest poverty and multi-ethnic areas of the County, such as Santa Ana, Garden Grove, Anaheim, and Buena Park, as well as all of the rest of Central and North Orange County. Through this program, we target seniors with the greatest needs. Many of the participants we serve live on fixed incomes with 70% living at or below the federal poverty level. When adjusted for the cost of living in Orange County, more than 90% of our clients live below the Elder Economic Index developed by UCLA. All of our participants are homebound due to illness or disability and most are having to choose whether to purchase prescriptions, food, or pay utilities, causing them to be food insecure. This is especially true for older adults who are homebound due to illness or disability

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The meals provide not only important nutrition, but they also provide socialization, which reduces isolation and depression. The Meals on Wheels participants receive their meals from either volunteers or staff members, for many of these participants, this will be the only person they will see all day.

**How do you identify/qualify those in need? How often is the food distribution offered?**

SeniorServ provides three meals a day, five days a week to older adults who are homebound, by reason of illness or disability. In addition to the meals, these clients receive case management services and in-home services as needed. Each *Meals on Wheels* senior is assigned a case manager who has, at a minimum, quarterly contact with the senior. Case managers track the senior's needs and progress and provide home safety checks, information and referral services, and in-home services (personal care, homemaking) as needed.

Program Eligible Seniors Meet the Following Criteria

- Homebound- client has severe functioning disabilities and is not able to leave their home without extraordinary help.
- Physically unable to ambulate, bedridden, great difficulties ambulating, fatigued, chronic pain, or low energy.
- Factors relating to disabilities in vision (blind, cataracts, legal blindness, limited vision), motor coordination (physically disabled, amputation), or mental impairment (Dementia/Alzheimer's/memory issues).
- Lives alone or is completely dependent on home delivered meals and/or eligible caregiver with physical impairments or experiencing caregivers stress.
- Inadequate support- unstable family support, support system not intact.
- Activities of Daily Living deficiencies (cases by case variation, those with more severe deficiencies are considered higher priority).
- Nutritional Risk Score 10+.

**How many people will be served by the food distribution program (children, youth, adults, seniors)? Please explain how you keep track of number of people served.**

During the 2018-19 fiscal year, we anticipate serving 600,000 home delivered meals to 1,000 unduplicated homebound seniors age 60+.

The number of meals and clients served in our Meals on Wheels program is measured by our kitchen staff and drivers and is tracked by number of meals delivered to each specific client. This is tracked in a system called Servtracker.

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**III. Project Budget**

| <b>Line Item</b> | <b>Line Item Description</b>                  | <b>Requested Amount</b> |
|------------------|---|-------------------------|
| Protein          | 1,400 lbs. of beef @ \$4.19 a pound           | \$5,866                 |
| Protein          | 800 lbs. of chicken @ \$4.84 a pound          | \$3,872                 |
| Dairy            | 21,052 ½ pint cartons of milk @ .19 cents ea. | \$3,999.88              |
| Vegetables       | 30 cases spinach @ \$20.25 a case             | \$607.50                |
| Fruit            | 18 cases of apricots @ \$36.37 a case         | \$654.62                |
| <b>TOTAL:</b>    |   | <b>\$15,000</b>         |

**IV. Administrative Expenses Percentage**

This section calculates how much the organization spent for general management, overhead, indirect items as a percentage of the organization's total expenses. The figures are based on your most current 990 form that you submitted, Part IX Statement of Functional Expenses.

| <b>Management &amp; general expenses (Column C only)</b> | <b>/Total expenses (Column A)</b> | <b>= Administrative Percentage</b> |
|--|-----------------------------------|------------------------------------|
| \$750,098  | \$11,711,293                      | \$6.40%                            |



Department of the Treasury  
Internal Revenue Service

P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0248674160  
July 13, 2011 LTR 4168C E0  
95-2771715 000000 00

00012506  
BODC: TE

COMMUNITY SENIORSERV INC  
1200 N KNOLLWOOD CIR  
ANAHEIM CA 92801-1309



030865

Employer Identification Number: 95-2771715  
Person to Contact: Mrs. Ryan  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your July 01, 2011, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in November 1971.

Our records also indicate that 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.

Please refer to our website [www.irs.gov/eo](http://www.irs.gov/eo) for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.



**\*PUBLIC DISCLOSURE COPY\***

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX.  X

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.   | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|--|-----------------------|---------------------------------|--|-----------------------------|
| 1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.  |                       |                                 |  |                             |
| 2 Grants and other assistance to domestic individuals. See Part IV, line 22.   |                       |                                 |  |                             |
| 3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.  |                       |                                 |  |                             |
| 4 Benefits paid to or for members  |                       |                                 |  |                             |
| 5 Compensation of current officers, directors, trustees, and key employees   | 358,214.              | 326,412.                        | 31,802.                                | 0.                          |
| 6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).   | 0.                    | 0.                              | 0.                                     | 0.                          |
| 7 Other salaries and wages   | 3,213,321.            | 2,995,407.                      | 28,502.                                | 189,412.                    |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)   | 150,654.              | 32,493.                         | 116,240.                               | 1,921.                      |
| 9 Other employee benefits  | 547,189.              | 506,552.                        | 40,637.                                |                             |
| 10 Payroll taxes   | 273,773.              | 240,677.                        | 19,113.                                | 13,983.                     |
| 11 Fees for services (non-employees):  |                       |                                 |  |                             |
| a Management   |                       |                                 |  |                             |
| b Legal  | 30,570.               |                                 | 30,570.                                |                             |
| c Accounting   | 54,698.               | 52,488.                         | 2,210.                                 |                             |
| d Lobbying   |                       |                                 |  |                             |
| e Professional fundraising services. See Part IV, line 17.   |                       |                                 |  |                             |
| f Investment management fees   |                       |                                 |  |                             |
| g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O, SCH. O)  | 1,469,640.            | 1,401,220.                      | 11,648.                                | 56,772.                     |
| 12 Advertising and promotion   |                       |                                 |  |                             |
| 13 Office expenses   | 101,244.              | 90,227.                         | 11,010.                                | 7.                          |
| 14 Information technology  | 131,180.              | 106,909.                        | 18,099.                                | 6,172.                      |
| 15 Royalties   |                       |                                 |  |                             |
| 16 Occupancy   | 144,965.              | 144,965.                        |  |                             |
| 17 Travel  | 855,738.              | 850,605.                        | 633.                                   | 4,500.                      |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials  |                       |                                 |  |                             |
| 19 Conferences, conventions, and meetings  |                       |                                 |  |                             |
| 20 Interest  | 45,500.               |                                 | 45,500.                                |                             |
| 21 Payments to affiliates  |                       |                                 |  |                             |
| 22 Depreciation, depletion, and amortization   | 240,904.              | 112,345.                        | 128,559.                               |                             |
| 23 Insurance   | 163,964.              | 100,688.                        | 31,694.                                | 31,582.                     |
| 24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)                                       |                       |                                 |  |                             |
| a <u>FOOD AND SUPPLY COST</u>  | 2,990,626.            | 2,990,626.                      |  |                             |
| b <u>TELEPHONE/UTILITIES</u>   | 242,007.              | 208,388.                        | 32,291.                                | 1,328.                      |
| c <u>DIRECT MAIL</u>   | 166,444.              |                                 | 8,440.                                 | 158,004.                    |
| d <u>MISCELLANEOUS EXPENSES</u>  | 138,874.              | 83,895.                         | 51,683.                                | 3,296.                      |
| e All other expenses.  | 391,788.              | 246,039.                        | 141,467.                               | 4,282.                      |
| 25 Total functional expenses. Add lines 1 through 24e.   | 11,711,293.           | 10,489,936.                     | 750,098.                               | 471,259.                    |
| 26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720). |                       |                                 |  |                             |

Community Senior Serv  
2018-2019 Budget (Internal) vs 2017-2018 Actual

| 2018-2019 Budget (Internal)                            |                    |                                 |            |            |                    |                    |                   |                    |                                 | 2017-2018 Actual |                    |                    |                   |                          |               |  |  |  |  |
|--|--------------------|---------------------------------|------------|------------|--------------------|--------------------|-------------------|--------------------|---------------------------------|------------------|--------------------|--------------------|-------------------|--------------------------|---------------|--|--|--|--|
| Program  | Revenue            | Temporarily Restricted Released | OTD Equip  | Severance  | Total Revenue      | Expend             | Net Income (Loss) | Revenue            | Temporarily Restricted Released | OTD Balance      | Total Revenue      | Expend             | Net Income (Loss) | Net Income Variance 2016 | Variance %    |  |  |  |  |
|  |                    |                                 |            |            |                    |                    |                   |                    |                                 |                  |                    |                    |                   | Budget (2016)            |               |  |  |  |  |
| OT   | \$1,794,441        | \$308,319                       | \$0        | \$0        | \$2,102,760        | \$1,201,390        | \$901,370         | \$1,701,795        | \$4,579                         | \$48,879         | \$2,207,153        | \$1,246,452        | \$960,701         | \$1,711,171              | 114.6%        |  |  |  |  |
| CT   | \$1,305,244        | \$11,457                        | \$0        | \$0        | \$1,316,701        | \$1,444,445        | (\$127,744)       | \$1,205,653        | \$0                             | \$0              | \$1,205,653        | \$1,444,445        | (\$238,792)       | \$1,411,171              | 100.0%        |  |  |  |  |
| Senior Park Dev Grnt                                   | \$177,615          | \$11,279                        | \$0        | \$0        | \$188,894          | \$188,894          | \$0               | \$188,894          | \$0                             | \$0              | \$188,894          | \$188,894          | \$0               | \$188,894                | 100.0%        |  |  |  |  |
| Case Management  | \$165,197          | \$11,279                        | \$0        | \$0        | \$176,476          | \$176,476          | \$0               | \$176,476          | \$0                             | \$0              | \$176,476          | \$176,476          | \$0               | \$176,476                | 100.0%        |  |  |  |  |
| Sub-home   | \$142,673          | \$0                             | \$0        | \$0        | \$142,673          | \$142,673          | \$0               | \$142,673          | \$0                             | \$0              | \$142,673          | \$142,673          | \$0               | \$142,673                | 100.0%        |  |  |  |  |
| Transportation   | \$102,197          | \$0                             | \$0        | \$0        | \$102,197          | \$102,197          | \$0               | \$102,197          | \$0                             | \$0              | \$102,197          | \$102,197          | \$0               | \$102,197                | 100.0%        |  |  |  |  |
| Wage   | \$100,000          | \$13,800                        | \$0        | \$0        | \$113,800          | \$113,800          | \$0               | \$113,800          | \$0                             | \$0              | \$113,800          | \$113,800          | \$0               | \$113,800                | 100.0%        |  |  |  |  |
| Specific Services (SAC)                                | \$11,000           | \$0                             | \$0        | \$0        | \$11,000           | \$11,000           | \$0               | \$11,000           | \$0                             | \$0              | \$11,000           | \$11,000           | \$0               | \$11,000                 | 100.0%        |  |  |  |  |
| Chore, Home (Discretionary Grant)                      | \$0                | \$1,600                         | \$0        | \$0        | \$1,600            | \$1,600            | \$0               | \$1,600            | \$0                             | \$0              | \$1,600            | \$1,600            | \$0               | \$1,600                  | 100.0%        |  |  |  |  |
| Change of Jurisdiction (ONG Grant)                     | \$0                | \$1,154                         | \$0        | \$0        | \$1,154            | \$1,154            | \$0               | \$1,154            | \$0                             | \$0              | \$1,154            | \$1,154            | \$0               | \$1,154                  | 100.0%        |  |  |  |  |
| Discretion   | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| <b>Total All Programs</b>                              | <b>\$1,317,466</b> | <b>\$17,352</b>                 | <b>\$0</b> | <b>\$0</b> | <b>\$1,334,818</b> | <b>\$1,334,818</b> | <b>\$0</b>        | <b>\$1,334,818</b> | <b>\$0</b>                      | <b>\$0</b>       | <b>\$1,334,818</b> | <b>\$1,334,818</b> | <b>\$0</b>        | <b>\$1,334,818</b>       | <b>100.0%</b> |  |  |  |  |
| <b>Grant Income - Company 1</b>                        |                    |                                 |            |            |                    |                    |                   |                    |                                 |                  |                    |                    |                   |                          |               |  |  |  |  |
| Net Grant Revenue                                      | \$315,750          | \$0                             | \$0        | \$0        | \$315,750          | \$315,750          | \$0               | \$315,750          | \$0                             | \$0              | \$315,750          | \$315,750          | \$0               | \$315,750                | 100.0%        |  |  |  |  |
| Grant Release  | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grants                   | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released OTD Grant                | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grant Income             | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Unrestricted Grant Income                              | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Total Temporary Restricted & Unrestricted Grant Income | <b>\$315,750</b>   | <b>\$0</b>                      | <b>\$0</b> | <b>\$0</b> | <b>\$315,750</b>   | <b>\$315,750</b>   | <b>\$0</b>        | <b>\$315,750</b>   | <b>\$0</b>                      | <b>\$0</b>       | <b>\$315,750</b>   | <b>\$315,750</b>   | <b>\$0</b>        | <b>\$315,750</b>         | <b>100.0%</b> |  |  |  |  |
| <b>Company 2</b>                                       |                    |                                 |            |            |                    |                    |                   |                    |                                 |                  |                    |                    |                   |                          |               |  |  |  |  |
| Net Grant Revenue                                      | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Grant Release  | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grants                   | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released OTD Grant                | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grant Income             | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Unrestricted Grant Income                              | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Total Temporary Restricted & Unrestricted Grant Income | <b>\$1,000,000</b> | <b>\$0</b>                      | <b>\$0</b> | <b>\$0</b> | <b>\$1,000,000</b> | <b>\$1,000,000</b> | <b>\$0</b>        | <b>\$1,000,000</b> | <b>\$0</b>                      | <b>\$0</b>       | <b>\$1,000,000</b> | <b>\$1,000,000</b> | <b>\$0</b>        | <b>\$1,000,000</b>       | <b>100.0%</b> |  |  |  |  |
| <b>Company 3</b>                                       |                    |                                 |            |            |                    |                    |                   |                    |                                 |                  |                    |                    |                   |                          |               |  |  |  |  |
| Net Grant Revenue                                      | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Grant Release  | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grants                   | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released OTD Grant                | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grant Income             | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Unrestricted Grant Income                              | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Total Temporary Restricted & Unrestricted Grant Income | <b>\$1,000,000</b> | <b>\$0</b>                      | <b>\$0</b> | <b>\$0</b> | <b>\$1,000,000</b> | <b>\$1,000,000</b> | <b>\$0</b>        | <b>\$1,000,000</b> | <b>\$0</b>                      | <b>\$0</b>       | <b>\$1,000,000</b> | <b>\$1,000,000</b> | <b>\$0</b>        | <b>\$1,000,000</b>       | <b>100.0%</b> |  |  |  |  |
| <b>Company 4</b>                                       |                    |                                 |            |            |                    |                    |                   |                    |                                 |                  |                    |                    |                   |                          |               |  |  |  |  |
| Net Grant Revenue                                      | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Grant Release  | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grants                   | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released OTD Grant                | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grant Income             | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Unrestricted Grant Income                              | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Total Temporary Restricted & Unrestricted Grant Income | <b>\$1,000,000</b> | <b>\$0</b>                      | <b>\$0</b> | <b>\$0</b> | <b>\$1,000,000</b> | <b>\$1,000,000</b> | <b>\$0</b>        | <b>\$1,000,000</b> | <b>\$0</b>                      | <b>\$0</b>       | <b>\$1,000,000</b> | <b>\$1,000,000</b> | <b>\$0</b>        | <b>\$1,000,000</b>       | <b>100.0%</b> |  |  |  |  |
| <b>Company 5</b>                                       |                    |                                 |            |            |                    |                    |                   |                    |                                 |                  |                    |                    |                   |                          |               |  |  |  |  |
| Net Grant Revenue                                      | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Grant Release  | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grants                   | \$1,000,000        | \$0                             | \$0        | \$0        | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000        | \$0                             | \$0              | \$1,000,000        | \$1,000,000        | \$0               | \$1,000,000              | 100.0%        |  |  |  |  |
| Temporary Restricted Released OTD Grant                | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Temporary Restricted Released Grant Income             | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Unrestricted Grant Income                              | \$0                | \$0                             | \$0        | \$0        | \$0                | \$0                | \$0               | \$0                | \$0                             | \$0              | \$0                | \$0                | \$0               | \$0                      | 100.0%        |  |  |  |  |
| Total Temporary Restricted & Unrestricted Grant Income | <b>\$1,000,000</b> | <b>\$0</b>                      | <b>\$0</b> | <b>\$0</b> | <b>\$1,000,000</b> | <b>\$1,000,000</b> | <b>\$0</b>        | <b>\$1,000,000</b> | <b>\$0</b>                      | <b>\$0</b>       | <b>\$1,000,000</b> | <b>\$1,000,000</b> | <b>\$0</b>        | <b>\$1,000,000</b>       | <b>100.0%</b> |  |  |  |  |



S. L. Gimbel Foundation 2016 Holiday Food Grant Report

Organizational Information

|   |   |
|---|---|
| Q1: Name of your organization.  | Community SeniorServ dba SeniorServ   |
| Q2: Grant #   | 20160703  |
| Q3: Grant Period  | December 1, 2016 to June 30, 2017   |
| Q4: Location of your organization   | City Anaheim State California   |
| Q5: Name and Title of person completing evaluation.   | Darla Olson, VP Advancement   |
| Q6: Phone Number:   | 714-229-3362  |
| Q7: Email address.  | <a href="mailto:dolson@seniorserv.org">dolson@seniorserv.org</a>  |
| Q8: Total number of clients served through this grant funding:  | 8,709 unduplicated seniors  |
| Q9: Approximate volume of food purchased with grant funds? (i.e 10 lbs of fresh produce; 1000 boxes; 10 cases, etc) | 600 lbs. of beef, 30 cases of chicken, 21,095 ½ pint cartons of milk, 26 cases of vegetables, and 8 cases of fruit. |

Key Outcomes and Results

|  |
|--|
| <p><b>Q10: Describe the project's key outcomes and results based on your goals and objectives:</b></p> <p>The primary goals of our senior nutrition programs are to reduce food insecurity and isolation among older adults age 60 and over, so they can remain in their homes and the community for as long as possible.</p> <p>To meet these goals the below objectives were set for the period of July 1, 2016 through June 30, 2017</p> <p>Objective I: Provide hot, nutritious lunches to 6,500 older adults every weekday from 25 senior centers in Orange County.</p> <p>SeniorServ provided a total of 273,330 nutritional lunches to 7,202 unduplicated clients during the period from 25 senior centers in Orange County.</p> <p>Objective II: Provide 600,000 meals (three meals each weekday) to 1,300 homebound older adults residing in 20 cities in Orange County.</p> <p>SeniorServ provided 640,539 home delivered meals to 1,292 unduplicated homebound older adults during the period.</p> <p>Objective III: Provide 850 homebound older with case management services, and in-home services and transportation services as needed.</p> |
|--|

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In addition to the meals, our home delivered meals participants received 9,435 hours of case management services to 852 homebound at-risk seniors.

**Q11: Please describe any challenges/obstacles the organization encountered (if any) in attaining stated goals & Objectives.**

Funding resources have been shrinking in the senior services arena. These reduced funding sources combined with inflation and the growing older adult population in our county, caused challenges in meeting the needs of our home bound seniors. Throughout the year, we had to carry a waiting list for interested seniors. At times, we carried over 100 seniors on that list.

**Q12: How did you overcome and/or address the challenges and obstacles?**

SeniorServ worked with its board of directors to develop the following strategies:

Increase direct mail appeals, participate in an OC Giving Day, research other grant makers, and leverage relationships to develop new funding sources.

**Q13: Describe any unintended positive outcomes as a result of the efforts supported by this grant.**  
The S.L. Gimbel grant was leveraged to garner other support in the community.

**Q14: Briefly describe the impact this grant has had on your organization.**

The \$10,000 grant from the S.L. Gimbel Foundation helped us to provide healthy, nutritious meals to low income older adults that improve their health and helped them to maintain their independence.

### Budget

**Q15: Please provide a brief narrative on how the funds were used to fulfill grant objectives.**

The \$10,000 received from the S.L. Gimbel Foundation was used to purchase raw food for our kitchen staff to prepare 5,555 meals for our home delivered and congregate program clients and participants.

Success Stories

Q16: Please relate a success story:

Home Delivered Client Story:

Alex's Story



95 year old Alex is no stranger to poverty. As one of seven hungry children during the Great Depression, he remembers the pain of hunger as if it were yesterday. After his father lost his job working on the railroad, Alex's family could not afford food, and often went to bed without dinner. Alex recalls his mother urging her hungry children to go to bed early many nights. "You'll forget you're hungry if you go to sleep," she would say.

Over 85 years have passed since the onset of the Great Depression, but Alex still vividly remembers what it feels like to be hungry. Now, an injured Veteran of WW II's Battle of the Bulge and a retired barber, Alex struggles to make ends meet on his social security and very small military pension. He was relieved when a doctor at the VA hospital suggested SeniorServ's Meals on Wheels as a source of nutrition. "I'm below the poverty line," Alex says. "With property taxes and utilities to pay, I just wouldn't make it without Meals on Wheels. I really need those meals. Thank God I am not hungry now."

The physical challenges Alex experienced from his wartime knee injury worsened considerably when he fell in his home two years ago, badly injuring his second knee. After cancelling a surgery and then later deciding to reschedule, surgery was no longer an option for Alex, according to his doctors. "I'm in trouble with my knees," said Alex. "I have a wheelchair, a walker, and a cane, but I can't get the surgery I need any longer. I guess I'm too old." Despite the suffering Alex has experienced, he does not harbor any regrets for serving his country. "I went through hell, but I did my part and I'm not sorry. I'd do it again if they called me," he said.

The Cypress resident has two adult children and "oodles" of grandchildren, great grandchildren, and great, great grandchildren, but doesn't get many visits. "Not many people come around to talk to a 95 year old man," he said. That's where SeniorServ's meal delivery volunteers make a tremendous difference. Alex is grateful for the volunteers who stop to chat when they deliver his meals 5 days a week, especially when they deliver drumsticks, his favorite menu item. "They know me and I know them. They are all my friends and are very, very nice."

###

Photo caption: Alex proudly displays his military memorabilia.

**Q17: Please relate a success story here:**

**Congregate Meal Participant Story:**



Phil and Bob (left to right)

#### **Senior Lunch Program Nourishes Body and Soul**

After losing his wife of 53 years, Bob joined a bereavement group at Hoag hospital to help him cope with his devastating loss. Bob connected and bonded deeply with the group, and realized how much it helped to be surrounded by the company of other older adults. As Bob entered this new life phase, he also recognized the importance of maintaining his health and the vital role nutrition played in sustaining a healthy life. For these reasons, when Bob discovered SeniorServ's lunch program at the Costa Mesa Senior Center, he quickly embraced the opportunity to enjoy a hot, nutritious lunch and the chance to meet new friends.

"It is important for me to go to lunch at the senior center," said Bob. "The nutritional value is very important to me. I would probably just fix cereal for lunch if I were home."

Bob attends the lunch program 3-5 times a week and usually sits at the same table alongside his friend Phil where he enjoys telling stories and sharing articles and pictures about his Navy experiences. Occasionally Bob also brings his 90 year old friend Elmer, a member of his bereavement group.

Not only does the 79 year old maintain good health nutritionally, he also participates in an exercise class offered at the senior center. "It would be difficult for me if I didn't have the senior center and the lunch program to go to," said Bob.

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Once, Bob and Phil ventured out to enjoy SeniorServ's lunch in another city, but found they both missed their friends in Costa Mesa. Bob commented, "I really enjoy sitting and talking with these people and the staff here is great!"

Q18: Please relate a success story here:

Home Delivered Client Story:



*Ruth – Meals on Wheels client*

Sometimes people choose to change their life plans in order to accommodate the needs of those they love. Ruth is one of those people. When family circumstances changed, Ruth made the decision to dedicate many of her retirement years to becoming the care provider for three grandchildren. It was a busy life of cooking, cleaning and babysitting. It was more tiring than the first time around, but she loved helping her family.

Eventually Ruth's grandchildren grew up, and Ruth resumed her life alone in a small apartment. Ruth was determined not to ask her adult children for assistance. Despite dedicating many of her golden years to raising a second generation of children, Ruth couldn't stand the thought of becoming a burden to the family she loved. She said, "I'm trying to get by with a minimum of problem to my two sons. They have their own families and things going on."

Sadly, Ruth became ill with what she soon learned was COPD, and life as she knew it came to a screeching halt. She was imprisoned by her physical limitations. Requiring oxygen 24 hours a day was a difficult transition. Ruth explained, "All of a sudden, I am just here... it's like I'm in a little cubicle all by myself."

Before SeniorServ learned of her plight, one of the biggest challenges Ruth faced was eating. She did not have the stamina to walk to the elevator down the long hall in her apartment building to get to her car. "I remember going to my door with my purse over my shoulder and the portable oxygen on the other. I'd get to the hallway and think, 'I can't get to my car. I cannot do it. I cannot. I'm not that hungry.'" But she was.

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At one point Ruth weighed a mere 86 pounds. Determined not to ask for help, she suffered alone. Finally, in desperation, Ruth asked her grandson to take her shopping to purchase Ensure. Even then, Ruth was hungry. She recalled, "It was pretty nightmarish to just sit here and be hungry and think all I have is a bottle of Ensure."

Thank goodness SeniorServ learned of Ruth's situation. Today, SeniorServ's nutritious Meals on Wheels are delivered directly to Ruth's front door, along with a cheerful greeting and a dose of the love she has generously given to others for so many years.

Ruth is comforted knowing SeniorServ is there for her. She no longer needs to worry about what she will eat, whether or not she can make it out to the market, or being a burden to her family. She said, "It's a wonderful, life-saving thing to know that I'm not going to have to struggle to try to get to food for myself. Now, it's brought to me and it's like Christmas. Every morning is like Christmas."

Demographic Information

|  |                         |
|--|-------------------------|
| Q19: Which category best describes your organization. Please choose only one.                        | Senior Citizen Support  |
| Q20: What is your organizations primary Program Area of Interest?                                    | Health & Human Services |
| Q21: Percentage of clients served through grant in each Ethnic Group Category. Total must equal 100% |                         |
| African American   | 2                       |
| Asian/Pacific Islander   | 12                      |
| Caucasian  | 61                      |
| Native American  | 1                       |
| Hispanic Latino  | 24                      |
| Q22: Approximate percentage of clients served from grant funds in each age category.                 |                         |
| Adults   | 3                       |
| Senior Citizens  | 97                      |
| Q23: Approximate percentage of clients served with disabilities from grant funds.                    |                         |
| No clients served with disabilities  | 20                      |
| Q24: Approximate percentage of clients served in Economic Group                                      |                         |
| At/Below Poverty Level   | 50                      |
| Other  | 50                      |
| Q25: Approximate percentage of clients served from grant funds in each population category. Single   |                         |
| Adults   | 3                       |
| Elderly  | 97                      |