



# 2014 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:  
Grant: 2014 0331

\$12,988

## Organization / Agency Information

<i>Organization/Agency Name:</i> Acacia Adult Day Services <u>20147</u>		
<i>Physical Address:</i> 11391 Acacia Parkway		<i>City/State/Zip</i> Garden Grove, CA 92840
<i>Mailing Address:</i> 11391 Acacia Parkway		<i>City/State/Zip</i> Garden Grove, CA 92840
<i>CEO or Director:</i> Mallory Vega		<i>Title:</i> Executive Director
<i>Phone:</i> (714) 530-1566	<i>Fax:</i> (714) 530-1592	<i>Email:</i> mvega@acacia-services.org
<i>Contact Person:</i> Mallory Vega		<i>Title:</i> Executive Director
<i>Phone:</i> (714) 530-1566	<i>Fax:</i> (714) 530-1592	<i>Email:</i> mvega@acacia-services.org
<i>Web Site Address:</i> www.acacia-services.org		<i>Tax ID:</i> 95-3509323

## Program / Grant Information

**Interest Area:**  Health  Environment  Animal Protection  Education  Human Dignity

<i>Program / Project Name:</i> Adult Day Health Care Program		
<i>Amount of Grant Requested:</i> \$15,000 <u>overhead \$2,012</u>	<i>Total Organization Budget:</i> \$2,218,482	<i>Percentage of Organization's Total Budget used for Administration:</i> 11.5%
<i>Purpose of Grant Request (one sentence):</i> Acacia respectfully requests \$15,000 in funding to provide adult day health care services to disabled seniors who require daily assistance to remain independent, enabling their family caregivers to continue working and avoid institutionalizing their loved one.		
<i>Gimbel Grants Received: List Year(s) and Award Amount(s)</i> None		

## Signatures

<i>Board President / Chair: (Print name and Title)</i> David Bertka, Board President	<i>Signature:</i> <u>David Sater</u>	<i>Date:</i> <u>03/17/2014</u>
<i>Executive Director/President: (Print name and Title)</i> Mallory Vega, Executive Director	<i>Signature:</i> <u>Mallory Vega</u>	<i>Date:</i> <u>03/17/2014</u>

**Acacia Adult Day Services**  
Grant Request to the **SL Gimbel Foundation**  
for **\$15,000** to support the Adult Day Health Care Program  
March 2014

Narrative

I. Organization Background, Accomplishments, Program

Founded in 1979, **Acacia Adult Day Services** is *dedicated to improving the quality of life for frail older adults, persons with dementia or other disabilities and their families by providing expert, supportive care in an inviting and interactive setting.* Our values are: quality service, leadership, advocacy, respect, diversity, innovation, community partnership, professionalism, and fiscal responsibility.

Acacia provides a variety of **supportive services to older adults who require assistance or supervision during the day**, because they do not have access to, or cannot afford, in-home services. **Services include** adult day care, adult day health care, dementia care and services such as restorative therapy, transportation to and from Acacia and/or medical appointments, and geriatric case management. In addition, Acacia provides assistance to caregivers and families, critical in helping them overcome the overwhelming challenges of providing daily care for their loved one.

One of our most **recent accomplishments** was the addition of a new program, Acacia Secure, in 2011, which provides specialized day care services to meet the needs of adults suffering from Alzheimer's disease or other types of dementia, as well as their families. This program has been well received and enrollments continue to grow from families in need.

Target Population

Acacia is located in Garden Grove, CA, and serves the local community, primarily in **north and central Orange County**. In FY 2012-13, Acacia **served 210 adults**, the majority of whom were **low-income individuals (81%)**, with each having an average of 2 family members impacted with caregiving duties. Our participants represent our diverse community, with 51% of Asian/Pacific Islander ethnicity, 25% Caucasian, 20% Hispanic, and 4% African American. Sixty-two percent (62%) were female, and the average age was 76 years old.

II. Project Information

Statement of Need

In Orange County, approximately **16.5% are seniors over the age of 60, with 40% disabled** (Office on Aging, 2010). Many require daily assistance to remain independent. Today, the **majority of Acacia's participants have a medically complex profile, with over 50% having six diagnoses.** The top five diagnoses include: Cardiovascular Accidents, Alzheimer's Disease, Hypertension, and Depression or other Mental Health Diagnosis. In addition, 63% also require medication management, 73% need assistance with Activities of Daily Living, over 50% suffer from dementia or other cognitive limitations, over 50% require skilled nursing services, 68% use an assistive device, and 40% are functionally dependent. It is essential to provide services that enhance the health and well-being of our seniors, and provide support for their family caregivers as they struggle to overcome the physical, emotional, and financial responsibilities they face as a result of these conditions.

**Acacia Adult Day Services**  
Grant Request to the **SL Gimbel Foundation**  
for **\$15,000** to support the Adult Day Health Care Program  
March 2014

The care provided by Acacia is an essential life-line in restoring or maintaining our participants' optimal capacity for self-care, delaying or preventing inappropriate or undesirable institutionalization. It has been statistically proven that most individuals facing health issues, given the option, would prefer to remain living in their own homes for as long as possible. Surrounded by loving family members, they can get the help they need from them while they are home. During the day, however, when family members are working or taking care of other important business in their lives, they can bring their loved ones to Acacia, where they benefit from the supervision of trained professionals who are prepared to meet their needs throughout the day. Services provided include healthy meals, regular exercise, therapies, medical monitoring, and nursing supervision.

Project Goal

In 1993, Acacia expanded its services to include an **Adult Day Health Care component**. This was in response to witnessing the increased need for medical care commonly associated with the aging of our participants. In addition, Acacia saw an increase in the number of new clients who needed medical care as well as day care. **The goal of the program** is to meet the needs of the participants by providing medical monitoring and care, as well as provide compassionate and professional services that increase their quality of life, provide respite and education to caregivers, and help families overcome economic hardships by enabling caregivers to remain in the workforce. This prolongs the time the elder adult can stay at home, thus avoiding the huge costs of institutions. Acacia is proud to say that "we keep families together."

Objectives and Methodology

For FY 2014-15, the **objectives** for Acacia's Adult Day Health Care Program are:

**Objective I:** Serve at least 175 adult participants who require medical intervention as part of their daily care.

**Activities:** Professionally-trained staff will provide medical supervision and care to participants as needed, in addition to the standard daily care and activities provided as part of the day care service.

**Objective II:** At least 75% of participants will maintain or improve 2 or more of their functional ADLs (Activities of Daily Living). ADLs include dressing, toileting, feeding, etc.

**Activities:** Staff and volunteers will monitor and record each participant's activities and services received throughout the day.

**Objective III:** At least 75% of participants will maintain or improve 2 or more of their functional IADLs (Instrumental Activities of Daily Living). IADLs include medication administration, shopping, cooking, cleaning, etc.

**Activities:** Staff and volunteers will monitor and record each participant's activities and services received throughout the day.

The attainment of our objectives is measured through the use of initial assessments, daily nursing flow sheets, and a personal outcomes summary.

**Acacia Adult Day Services**  
Grant Request to the **SL Gimbel Foundation**  
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March 2014

Community Projects and Partners

Currently there are two other Adult Day Health Care centers that serve the city of Anaheim. Of those two, one is focused primarily on the Middle Eastern populations living in and around the city, while the other is in the northeastern corner of the city. Acacia offers an inclusive program that celebrates and welcomes all ethnic groups and is much closer to the central, west and southern portions of Anaheim.

Acacia collaborates with several agencies to supplement services and increase access for participants, including SeniorServ for meals, and OCTA/Abrazar/Horizon for transportation to Acacia, doctor appointments, shopping, pharmacy visits, visiting family, and places of worship. Additional support, training and resources are provided in conjunction with various organizations, including the Alzheimer's Association, the Caregiver Resource Center, CalOptima, and the Office on Aging.

Budget

The cost to Acacia to provide the Adult Day Health Care services is approximately **\$115 per day per participant**. Although some of our participants have insurance to cover this expense, many of our participants are underinsured or uninsured. Therefore, support from the community is essential to enable Acacia to continue to provide this critical service to the growing population of adults with medical conditions. **Funding from the S. L. Gimbel Foundation** will be used to **support the direct program service expenses**, including professional staff, as well as medical supplies.

III. Future Support

Acacia has an ongoing fundraising plan in place to generate revenue to continue to meet the needs of the organization. Income resources include individual donations (14%), fundraising events(2%), contracts (10%), private and public grants (64%), and in-kind donations (10%).

IV. Governance, Executive Leadership, Staff

Acacia operates with a staff of 34 employees, including a Licensed Clinical Social Worker and a Registered Nurse. Mallory Vega (BA and Certificate in Gerontology) has been the Executive Director since the inception of the organization. The Board consists of 13 business and civic leaders from the community who are responsible for fiduciary and program oversight, as well as fundraising. Committees include Finance, Leadership, Personnel, Site Advisory, Marketing, Facilities Management, and Fund Development.

**2014 S.L. Gimbel Foundation APPLICATION**

**V. Project Budget**

A) Please provide a detailed line-item budget for your project by completing the table below.  
Include all sources of funding for the proposed project.

<b>Line Item Description</b>	<b>Line Item Explanation (Formula/equation used as applicable. Example: 40 books @ \$100 each = \$4000)</b>	<b>Support From Your Agency</b>	<b>Support From Other Funders</b>	<b>Requested Amount From TCF</b>	<b>Line Item Total of Project</b>
Licensed Vocational Nurse	\$20 hr x 10 hr x 52 = \$10,400	\$7,364	0	\$3,036	\$10,400
Certified Nurse Aide	\$11.50 x 10 hr x 52 = \$5,980	\$1,231	\$3,000	\$1,749	\$5,980
Social Worker	\$22.00 x 10 hr x 52 = \$11,440	\$8,108	0	\$3,332	\$11,440
Program Aide	\$11.25 x 10 hr x 52 = \$5,850	\$4,139	0	\$1,711	\$5,850
Benefits	@ 21% = \$7071	\$4,376	\$630	\$2,065	\$7,071
Supplies	Paper products, art supplies, medical supplies, etc. \$15 day x 252 days = \$3,780	\$1,835	\$850	\$1,095	\$3,780
Overhead	@10% = \$6,897	\$4,885	0	\$2,012	\$6,897
<b>TOTALS:</b>	\$51,418	\$31,938	\$4,480	\$15,000	\$51,418

**VI. Sources of Funding:** Please list your current sources of funding and amounts.

*Secured/Awarded*

<b>Name of Funder: Foundation, Corporation, Government</b>	<b>Amount</b>
United Way	\$19,500
Pacific Life	\$10,000
Crean Foundation	\$10,000
Anaheim CDBG	\$10,000

*Pending*

<b>Name of Funder: Foundation, Corporation, Government</b>	<b>Amount</b>	<b>Decision Date</b>
Sisters of St. Joseph	\$22,000	03/14

**VII. Financial Analysis**

**Agency Name:** Acacia Adult Day Services

**Most Current Fiscal Year (Dates):** From: July 1, 2012 To: June 30, 2013

This section presents an overview of an applicant organization’s financial health and will be reviewed along with the grant proposal. Provide all the information requested on your entire organization. Include any notes that may explain any extraordinary circumstances. Information should be taken from your most recent 990 and audit. Double Check your figures!

**Program to Total Expenses Ratio:** Percentage of expenses used to support programming versus how much is spent for general management and fundraising. A general rule is that at least 75 percent of total expenses should be used to support programs – the higher the percentage the better.

<b>Program Expenses</b>	<b>/Total Operating Expenses</b>	<b>= Program Expense Ratio</b>
\$1,838,932 ✓	\$2,079,120 ✓	88.4 % ✓
990: Part IX, Column B, Line 25	990: Part IX, Column A, Line 25	

<b>Administrative Expense (100%-Program Expense ratio) per 990 above</b>	<b>Percentage of Organization’s Current Total Budget used for Administration (from cover page)</b>	<b>Differential</b>
11.6 %	11.5 %	.1% %

If the differential is above (+) or below (-) 10%, provide an explanation:

**Quick Ratio:** Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$136,302	\$ 245,731	450,613	.847

**Excess or Deficit for the Year:**

<b>Excess or (Deficit) Most recent fiscal year end</b>	<b>Excess or (Deficit) Prior fiscal year end</b>
\$111,020	\$ 43,925

**Notes:**

**Diversity of Funding Sources:** A financially healthy organization should have a diverse mix of funding sources. Complete those categories that apply to your organization using figures from your most recent fiscal year.

<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>	<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>
Contributions	\$90,208	5	Program Fees	\$1,362,705	69
Fundraising/Special Events	\$36,046	2	Interest Income	\$ 1,277	0
Corp/Foundation Grants	\$43,317	2	Ptcept donation	\$55,600	3
Government Grants	\$264,923	13	In-kind	\$114,024	6



Acacia Adult Day Services  
11391 Acacia Parkway  
Garden Grove, CA 92840  
Tel 714.530.1566  
Fax 714.530.1592  
[www.acacia-services.org](http://www.acacia-services.org)

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Acacia Adult Day Services  
Board Members  
2013-2014

Executive Committee

Bertka, David -President  
Thomas, Sandy – Vice President  
Maese, Ben – Treasurer  
Krebs, Harry – Secretary  
Jones, Les – Past President

Occupation/Employer

Retired Fire Chief of Garden Grove Fire Department  
Branch Manager, Farmers & Merchants Bank  
Managing Member/CEO, 13 Tons, LLC  
Retired CEO, Tidelands Oil Productions  
Retired Assistant City Manager, City of Garden Grove

Board Members

Beliakoff, Elaine  
Cahill, Linda

Carroll, Patrick  
Catlin, Sue  
Clynes, Denise  
Hammer, Joe  
Jones, Steve

Little, Robert

Communications Advisor, Chevron  
Retired Employee Development Director, City of  
Garden Grove  
Retired Exec. Asst. to the President, CSUF  
Community Volunteer  
Director of Strategic Alliances  
Owner, California Relocation Services  
Owner, Olympia Holdings Corp./Councilmember,  
City of Garden Grove  
Retired CPA

Acacia Adult Day Services is a  
leader in providing services to  
improve and enhance the lives of  
frail older adults, persons with  
disabilities and their families.

*Acacia*

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## Acacia Adult Day Services Budget Comparison

	Actuals	Budget	Variance
	Most Recently Completed Completed Year	Projections Current Year	
	<b>2012-2013</b>	<b>2013-2014</b>	
<b>Income</b>			
Individual Contributions	\$90,208	\$100,500	\$10,292
Corporate Contributions	\$43,317	\$136,940	\$93,623
Foundation Grants	Incl'd above	\$112,870	\$112,870
<i>Government Contributions</i>	\$264,923	\$423,706	\$158,783
<i>Other Earned Income</i>	\$1,418,305	\$1,369,466	-\$48,839
<i>Other Unearned Income</i>	\$150,070	\$75,000	-\$75,070
Interest & Dividend Income	\$1,277	\$0	-\$1,277
<b>Total Income</b>	<b>\$1,968,100</b>	<b>\$2,218,482</b>	<b>\$250,382</b>
<b>Expenditures</b>			
<b>Personnel</b>			
Salary CEO	\$80,466	\$82,075	\$1,609
Salaries	\$932,248	\$1,078,913	\$146,665
Payroll Taxes	\$89,585	\$100,733	\$11,148
Insurance - Worker's Comp	\$24,348	\$14,184	-\$10,164
Insurance - Health	\$89,680	\$113,822	\$24,142
Outside Services/Registry	\$21,470	\$46,515	\$25,045
<b>Total Personnel</b>	<b>\$1,237,797</b>	<b>\$1,436,242</b>	<b>\$198,445</b>
<b>General Facilities/Program/Admin</b>			
Bank/Investment Fee	\$4,536	\$0	-\$4,536
Facilities	\$212,091	\$190,658	-\$21,433
Equipment	\$13,997	\$4,450	-\$9,547
Office/Program/Medical Supplies	\$52,989	\$18,160	-\$34,829
Programs	\$0	\$8,400	\$8,400
Program Consultants	\$61,349	\$51,420	-\$9,929
Conferences/Meetings	\$4,808	\$2,731	-\$2,077
Mileage	\$2,146	\$9,600	\$7,454
Audit/Accounting	\$12,214	\$13,333	\$1,119
Insurance Expense	\$17,203	\$19,348	\$2,145
Telephone/Internet	\$4,115	\$5,000	\$885
Dues/License/Subscriptions	\$13,665	\$11,240	-\$2,425
Postage/Printing/Copying	\$10,914	\$5,200	-\$5,714
Marketing/Fundraising	\$33,844	\$70,000	\$36,156
Food/Meals	\$135,839	\$128,260	-\$7,579
Transportation	\$253,924	\$177,358	-\$76,566
Volunteer/Staff/Board Recognition	\$7,604	\$7,392	-\$212
Contingency	\$0	\$59,690	\$59,690
Misc.	\$85		
<b>Total General Program/Administrative</b>	<b>\$841,323</b>	<b>\$782,240</b>	<b>-\$58,998</b>
<b>Total Expenditures</b>	<b>\$2,079,120</b>	<b>\$2,218,482</b>	<b>\$139,447</b>
<b>Revenue Less Expense</b>	<b>-\$111,020</b>	<b>\$0</b>	<b>\$110,935</b>



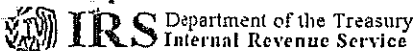
**Part IX Statement of Functional Expenses**

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 to any question in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	1,012,714	881,061	70,890	60,763
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	114,028	106,046	7,982	0
10 Payroll taxes	89,585	77,043	6,271	6,271
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	12,214	11,359	855	0
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.)	90,719	84,922	5,797	
12 Advertising and promotion	6,467	414	6,053	0
13 Office expenses	25,322	23,549	1,773	0
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel	2,146	265	1,881	0
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	4,808	4,471	337	0
20 Interest	2,836	2,836		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	94,190	87,597	6,593	0
23 Insurance	24,348	22,644	1,204	0
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 PROGRAM EXPENSES	14,396	14,396	0	0
b MEALS PROVIDED	127,939	127,939	0	0
c TRANSPORTATION	253,924	236,149	17,775	
d MAINTENANCE/REPAIRS	21,599	20,087	1,512	
e All other expenses	181,885	138,154	16,854	27,377
25 Total functional expenses. Add lines 1 through 24e	2,079,120	1,838,932	145,777	94,411
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)				



Department of the Treasury  
Internal Revenue Service

P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0248404892  
Apr. 11, 2013 LTR 4168C EO  
95-3509323 000000 00

00016667  
BODC: TE

ACACIA ADULT DAY SERVICES  
11391 ACACIA PKWY  
GARDEN GROVE CA 92840-5310



010820

Employer Identification Number: 95-3509323  
Person to Contact: Jeff Seibert  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Apr. 02, 2013, 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 September 1980.

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.

0248404892  
Apr. 11, 2013 LTR 4168C E0  
95-3509323 000000 00  
00016668

ACACIA ADULT DAY SERVICES  
11391 ACACIA PKWY  
GARDEN GROVE CA 92840-5310

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

Sincerely yours,

*Richard McKee*

Richard McKee, Department Manager  
Accounts Management Operations



The  
Community  
Foundation

Serving the Counties of Riverside and San Bernardino

*S. L. Gimbel Foundation Fund*

BOARD OF DIRECTORS June 12, 2014

James Cuevas  
Chair of the Board

Philip Savage IV  
Vice Chair of the Board

Pat Spafford, CPA  
Chief Financial Officer

Sean Varner  
Secretary of the Board

Glenda Bayless

Sergio Bohon

Rabbi Hillel Cohn

Andrea Dutton

Robert Fey

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Albert Karnig

D. Matthew Pim

Patrick O'Reilly

Rose Salgado

Beverly Stephenson

Grover Trask  
Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms Mallory Vega  
Executive Director  
Acacia Adult Day Services  
11391 Acacia Parkway  
Garden Grove, CA 92840

Dear Ms Vega:

Congratulations! A grant has been approved for **Acacia Adult Day Services** in the amount of **\$12,988** from the S.L. Gimbel Foundation. The **performance period for this grant is July 1, 2014 to June 30, 2015**. Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

**Adult Day Health Care Program: Provide adult day health care services to disable seniors. Please note: grant amount was reduced by \$2,012 for overhead costs. These costs are not covered by grant funds.**

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, please sign and date the enclosed copy and return the original copy to The Community Foundation within the next two weeks. Please retain a copy of the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. The **Grant Evaluation is due on July 15, 2015** and a copy will be available online at [www.thecommunityfoundation.net](http://www.thecommunityfoundation.net) under Grants/Forms.

If you have any questions, please call me at 951-684-4192 ext. 114 or email me at [ccudiamat@thecommunityfoundation.net](mailto:ccudiamat@thecommunityfoundation.net).

Sincerely,

Celia Cudiamat  
Executive Vice President

Acacia Adult Day Services

20140331

GIMB2



Confirmed in Compliance  
with National Standards for  
U.S. Community Foundations

## 2014 S.L. Gimbel Foundation Fund

### Grant Agreement

**Organization:** Acacia Adult Day Services

**Grant Amount:** \$ 12,988 **Grant Number:** 20140331

**Grant Period:** July 1, 2014 through June 30, 2015 (Final report due by July 15, 2015)

**Purpose:** Adult Day Health Care Program: Provide adult day health care services to disabled seniors. Grant amount reduced by \$2,012 for overhead costs that are not covered by grant funds.

#### 1. Use of Grant Funds

Grant funds must be expended within the grant period, for the purpose and objectives described in your grant proposal. Grant funds may not be expended for any other purpose without prior written approval by The Community Foundation. If there are significant difficulties in making use of the funds as specified in your proposal, or if the grant funds cannot be spent within the grant period, notify us in writing promptly.

Formal requests for extensions or variances must be submitted to the Foundation's Board of Directors for approval a minimum of 60 days before the end of the grant period.

Requests for variances or extensions are reviewed on a case-by-case basis and approved by the Board of Directors. If a request is denied, unused funds must be immediately refunded to the Foundation.

#### 2. Payment of Grant Funds

The grant funds will be paid in full by the Foundation upon receipt of the signed Grant Agreement. Challenge grant funds will be paid in full upon receipt of the signed Grant Agreement and upon receipt of documentation providing evidence that condition(s) of the challenge grant has/have been met.

#### 3. Certification and Maintenance of Exempt Organization Status

This grant is specifically conditioned upon Grantee's status as an eligible grantee of The Community Foundation. The Foundation has obtained a copy of the Grantee's IRS determination letter. Grantee confirms that it has not had any change in its tax-exempt status, and shall notify the Foundation immediately of any such change.

#### 4. Final Report and Records

The Grantee will submit the Grant Evaluation report per the deadline set forth in the award letter. This report includes a narrative on outcomes based on goals and objectives set forth in the grant proposal and an expenditure report documenting use of grant funds. If equipment was purchased, copies of receipts need to be included.

#### 5. Grantee's Financial Responsibilities

Grantee will keep records of receipts and expenditures of grant funds and other supporting documentation related to the grant at least four (4) years after completion of the grant and will make such records of receipts, expenditures and supporting documentation available to the Foundation upon request.

#### 6. Publicity

The Community Foundation recommends publicity for the grant and acknowledging The Community Foundation in internal correspondence, brochures as appropriate; newsletters, annual reports and email blasts or e-newsletters.

The credit line of "Made possible in part by a grant from the **"S.L. Gimbel Foundation Advised Fund at The Community Foundation – Inland Southern California"** is suggested. When your donors are listed in printed materials, include the S.L.

Gimbel Foundation Advised Fund at The Community Foundation in the appropriate contribution size category. When publishing our name, please note the "The" at the beginning of our name is a legal part of our name. It should always be used and capitalized. Attaching our logo is also appreciated. Our logo can be downloaded from our website at [www.thecommunityfoundation.net](http://www.thecommunityfoundation.net).

**7. Indemnification**

In the event that a claim of any kind is asserted against the Grantee or the Foundation related to or arising from the project funded by the Grant and a proceeding is brought against the Foundation by reason of such claim, the Grantee, upon written notice from the Foundation, shall, at the Grantee's expense, resist or defend such action or proceeding, at no cost to the Foundation, by counsel approved by the Foundation in writing.

Grantee hereby agrees, to the fullest extent permitted by law, to defend, indemnify, and hold harmless the Foundation, its offices, directors, employees, and agents, from and against any and all claims, liabilities, losses, and expenses (including reasonable attorneys' fees) directly, indirectly, wholly, or partially arising from or in connection with any act or omission by Grantee, its employees, or agents in applying for or accepting the Grant, in expending or applying the Grant funds or in carrying out any project or program supported by the Grant, except to the extent that such claims, liabilities, losses, and expenses arise from or in connection with any bad faith act or omission by the Foundation, its officers, directors, employees, or agent.

**8. Termination**

The Community Foundation may terminate this agreement, withhold payments, or both at any time, if, in the Community Foundation's judgment: a) The Community Foundation is not satisfied with the quality of the Grantee's progress toward achieving the project goals and objectives; b) the Grantee dissolves or fails to operate; c) the Grantee fails to comply with the terms and conditions of this agreement.

**9. Limitation of Support**

This Agreement contains the entire agreement between the parties with respect to the Grant and supersedes any previous oral or written understandings or agreements.

\*\*\*\*\*

**I have read and agree to the terms and conditions of the Grant Agreement.**

Mallory Vega  
Signature

Mallory Vega  
Printed Name

June 17, 2014  
Date

Executive Director  
Title

Organization: 2747 Acacia Adult Day Services  
Grant Number: 20140331

*dc*  
*6/25/14*



# The Community Foundation

Serving the Counties of Riverside and San Bernardino

## S. L. Gimbel Foundation Fund

### BOARD OF DIRECTORS

James Cuevas June 27, 2014  
Chair of the Board

Philip Savage IV Ms Mallory Vega  
Vice Chair of the Board Executive Director

Pat Spafford, CPA Acacia Adult Day Services  
Chief Financial Officer 11391 Acacia Parkway  
Garden Grove, CA 92840

Sean Varner  
Secretary of the Board

Glenda Bayless

Sergio Bohon The Community Foundation is pleased to enclose a grant check for **\$12,988** from the S.  
Rabbi Hillel Cohn L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the  
Andrea Dutton grant check, you are agreeing to the conditions stated under the *Terms of Grant* which  
Robert Fey you have signed and returned. The completed Grant Evaluation form is due by July 15,  
Paul Granillo 2015 and will be available online on The Community Foundations website under  
Stanley Grube Grants/Forms. Please note that any grant variances or extensions must be requested in  
writing and in advance. Any remaining grant funds must be returned to The Community  
Foundation at the end of the grant period.

Kirk Harns We greatly appreciate any help you can give us in publicizing the grant. **Please use the**  
Dr. Albert Karnig **following credit in any grant announcements or materials funded by the grant: "The**  
D. Matthew Pim **(name of project/program) is supported by a grant from The S. L. Gimbel**  
Patrick O'Reilly **Foundation."** You may send copies of articles printed in local papers, stories in your  
agency newsletter, annual report, press releases, and other publications for our files.

Rose Salgado

If you have any questions, please contact me at 951-684-4194.

Beverly Stephenson

Sincerely,

Grover Trask  
Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba  
President and CEO

Celia Cudiamat  
Executive Vice President

20140331

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Confirmed in Compliance  
with National Standards for  
U.S. Community Foundations

