

#13000 (No Overhead)



2015 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant: 20150630

Organization / Agency Information

<i>Organization/Agency Name:</i> Acacia Adult Day Services			2747
<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> (714) 530-1592	
<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: Animal Protection Education Environment Health Human Dignity

<i>Program/Project Name:</i> Adult Day Health Care Program		<i>Amount of Grant Requested:</i> \$15,000 13,000	
<i>Total Organization Budget:</i> \$2,219,762	<i>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</i> 88%	<i>Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100):</i> 7%	<i>Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100):</i> 12%
<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> 2014 - \$15,000			

Signatures

<i>Board President / Chair: (Print name and Title)</i> Sandy Thomas, Board President	<i>Signature:</i> 	<i>Date:</i> 6-26-2015
<i>Executive Director/President: (Print name and Title)</i> Mallory Vega, Executive Director	<i>Signature:</i> 	<i>Date:</i> 06-26-2015

Acacia Adult Day Services
Grant Request to the **SL Gimbel Foundation**
for **\$15,000** to support the Adult Day Health Care Program
June 2015

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** in order to maintain their ability to remain living in the community. **Services include** an adult day program, adult day health care, dementia care and services such as restorative therapy, transportation to and from Acacia, 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.

Accomplishments

In November, Acacia **celebrated its 35th Anniversary of service to the community.** Since our inception, Acacia has grown from serving 8 participants on opening day to over 8,000 participants and their family members. We now provide services to over 200 clients annually. Acacia continues to expand its capacity as an innovative, trusted resource and effective community partner providing services to promote health, wellness and independence for our clients and their families.

In 2013, Acacia began a two-year **Community-Based Home Health** program in conjunction with the California Association of Adult Day Services, six (6) other CBAS centers, and the managed care provider system with the addition of a Nurse Navigator who works with families to enable high-risk elderly adults with complex health conditions to live at home for as long as possible. Then, in 2015, Acacia began a two-year Pacific Life-funded PACT Track program, which provides an early intervention strategy of care by a Nurse Navigator to intervene with participants who exhibit “red flags” of heightened risk.

Target Population

Acacia is located in Garden Grove, CA, and serves the local community, primarily in **north and central Orange County.** In FY 2013-14, Acacia **served 209 participants with each having an average of 2 family members impacted with caregiving duties.** The majority of our participants were **low-income individuals (85%)** and reflect the diverse of our community with 56% of Asian/Pacific Islander ethnicity, 21% Caucasian, 21% Hispanic, and 2% African American. Sixty-eight percent (68%) 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

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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.

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, Methodology, and Evaluation

For FY 2015-16, the **objectives** for Acacia's Adult Day Health Care Program are:

Objective I: Serve at least 150 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.

Objective II: At least 75% of participants **will maintain or improve** 2 or more of their functional ADLs or IADL's (ADLs include dressing, toileting, feeding, etc., IADLs include medication administration, shopping, cooking, cleaning, etc.).

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Activities: Staff will complete initial assessments, quarterly, and 6 month reassessments with both staff and volunteers monitoring and recording each participant's activities and services received throughout the day.

Objective III: At least 70% of participants will maintain or improve their overall health status and remain in the community.

Activities: Staff ensure a history and physical form is completed by primary physician, an individual plan of care will be completed, and 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.

Community Projects and Partners

Acacia historically has sought to collaborate with other agencies to supplement services and increase access for participants. Partners include SeniorServ for meals, and OCTA/Abrazar 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.

Use of Funds

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. This plan includes: Developing and maintaining donor relationships, fundraising events such as a Casino Night, private and public grants, and in-kind donations.

IV. Governance, Executive Leadership, Staff

Acacia operates with a staff of 33 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 12 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.

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V. Project Budget

Provide a detailed line-item budget for your project by completing the table below.

A breakdown of specific line item requests and attendant costs should include:

- 1) Line item requests for materials, supplies, equipment and others:
 - a. Identify and list the type of materials, supplies, equipment, etc.
 - b. Specify the unit cost, number of units, and total cost
 - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff, compensation, benefits:
 - a. Identify the position; for each position request, specify the hourly rate and the number of hours (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
 - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)

Line Item Description	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
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
TOTALS:	\$51,418	\$31,938	\$4,480	\$15,000	\$51,418

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
Anaheim CDBG	\$10,000
Archstone Foundation	\$50,000
Boeing ECF	\$5,000
Crean Foundation	\$10,000
Disney VoluntEARS	\$5,000
Garden Grove Strawberry Festival Association	\$15,000
Gillespie Foundation	\$5,000
Office on Aging	\$42,000
Pacific Life	\$10,000
Sisters of St. Joseph	\$20,000
United Way Orange County	\$40,000 (over 2 yrs)

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Green Foundation	\$20,000	
Boeing ECF	\$5,000	
Allergan	\$5,000	

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.

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$132,830	5	Program Fees	\$1,817,926	74
Fundraising/Special Events	\$40,913	2	Interest Income	\$410	0
Corp/Foundation Grants	\$44,767	2	Part. Donation	\$54,623	3
Government Grants	\$231,021	10	In-kind	\$98,999	4

Notes:

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VII. Financial Analysis

Agency Name: Acacia Adult Day Services

Most Current Fiscal Year (Dates): From July 1, 2013 To: June 30, 2014

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!**

Form 990, Part IX: Statement of Functional Expenses

1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$2,472,675	\$2,187,034	\$174,392	\$111,249

2) Calculate the percentages of Columns B, C, and D, over A (per totals above)

- Program services (B) – A general rule is that at least 75% of total expenses should be used to support programs
- Management & general administration (C) – A general rule is that no more than 15% of total expenses should be used for management & general expenses
- Fundraising (D) – A general rule is that no more than 10% of total expenses should be used for fundraising

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	88%	7%	5%

3) Calculate the difference between your CURRENT year budget for management & general expenses and your previous management & general expenses per your 990 (Column C)

Percentage of Organization's Current Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
7 %	7 %	0 %

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

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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.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$154,862	\$273,441	\$484,640	.88

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
(\$51,186)	(\$111,020)

Notes:

VIII. Application submission check list:

	<u>Submit FOUR (4) Copies: 1 ORIGINAL (WITH ORIGINAL SIGNATURES) and 3 copies, collated and stapled together of the following:</u>		<u>Submit ONE (1) Copy:</u>
X	Completed Grant Application Form (cover sheet, narrative (3 pages maximum), budget and sources of funding, financial analysis page	X	A copy of your current 501(c)(3) letter from the IRS
X	A list of your Board members and their affiliations	X	A copy of your most recent year-end financial statements (audited if available; double-sided)
X	Your current operating budget and the previous year's actual expenses	X	A copy of your most recent 990 (double-sided)
X	Part IX only of the 990 form, Statement of Functional Expenses (one page). If you completed a 990-EZ, fill out the attached Part IX, Functional Expenses of the 990 form using figures from your 990-EZ		
X	For past grantees, a copy of your most recent final report.		

ACACIA ADULT DAY SERVICES

11391 Acacia Parkway, Garden Grove, CA 92840
(714) 530-1566

Fiscal Year 7/01/2015 - 6/30/2016

Board Executive Committee

Sandy Thomas - President
Pat McMaster - Vice President
Ben Maese - Treasurer
Harry Krebs - Secretary
Les Jones - Past President

Occupation/Employer

Branch Manager, Farmers & Merchants Bank
Director of Community Programs, OC School of the Arts
Managing Member/CEO, 13 Tons, LLC
Retired CEO, Tideland Oil Productions
Local Government Consultant

Board Members

Kelly Anvari
Linda Cahill
Patrick Carroll
Sue Catlin
Reverend Dr. Bau Dang
Joe Hammer
John Standiford

Director, Visiting Angels
Retired Employee Development Director, City of Garden Grove
Atty at Law, UCI-Labor and Employee Relations Consultant
Community Volunteer
Senior Pastor, Garden Grove United Methodist Church
Owner, California Relocation Services
Deputy Executive Director, Riverside Co Transportation Commission

Executive Staff

Mallory Vega
Julie Duarte
Judy Dickinson

Executive Director
Program Director
Development Director

Acacia Adult Day Services Budget Comparison

	Actuals	Budget	Variance
	Most Recently Completed Completed Year	Projections Current Year	
	2013-2014	2014-2015	
Income			
Individual Contributions	\$132,830	\$124,992	-\$7,838
Corporate Contributions	\$44,767	\$90,000	\$45,233
Foundation Grants	Incl'd above	\$107,078	\$112,870
<i>Government Contributions</i>	\$231,021	\$964,222	\$733,201
<i>Other Earned Income</i>	\$1,872,549	\$1,470,178	-\$402,371
<i>Other Unearned Income</i>	\$139,912	\$130,902	-\$9,010
Interest & Dividend Income	\$410	\$755	\$345
Total Income	\$2,421,489	\$2,888,127	\$472,430
Expenditures			
Personnel			
Salary CEO	\$81,544	\$82,080	\$536
Salaries	\$1,041,708	\$1,084,340	\$42,632
Payroll Taxes	\$118,162	\$119,277	\$1,115
Insurance - Worker's Comp	\$32,638	\$33,688	\$1,050
Insurance - Health	\$119,683	\$131,897	\$12,214
Outside Services/Registry	\$26,099	\$10,786	-\$15,313
Total Personnel	\$1,419,834	\$1,462,068	\$42,234
General Facilities/Program/Admin			
Bank/Investment Fee	\$6,863	\$2,213	-\$4,650
Facilities	\$213,436	\$236,865	\$23,429
Equipment	\$5,543	\$12,503	\$6,960
Office/Program/Medical Supplies	\$68,595	\$23,826	-\$44,769
Programs	\$0	\$8,945	\$8,945
Program Consultants	\$52,608	\$108,552	\$55,944
Conferences/Meetings	\$6,776	\$10,080	\$3,304
Mileage	\$3,549	\$2,290	-\$1,259
Audit/Accounting	\$11,475	\$12,829	\$1,354
Insurance Expense	\$14,405	\$27,630	\$13,225
Telephone/Internet	\$4,960	\$7,309	\$2,349
Dues/License/Subscriptions	\$13,178	\$18,429	\$5,251
Postage/Printing/Copying	\$7,209	\$16,796	\$9,587
Marketing/Fundraising	\$40,710	\$30,839	-\$9,871
Food/Meals	\$145,216	\$149,414	\$4,198
Transportation	\$455,582	\$759,734	\$304,152
Volunteer/Staff/Board Recognition	\$2,736	\$3,839	\$1,103
Contingency	\$0	\$0	\$0
Misc.	\$0	\$0	\$0
Total General Program/Administrative	\$1,052,841	\$1,432,093	\$379,252
Total Expenditures	\$2,472,675	\$2,894,161	\$421,486
Revenue Less Expense	-\$51,186	-\$6,034	\$50,944

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

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	1,123,252	977,229	78,628	67,395
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	152,321	141,658	10,663	0
10 Payroll taxes	118,162	101,620	8,271	8,271
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	11,475	10,672	803	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.)	87,007	81,497	5,510	
12 Advertising and promotion	5,127	284	4,843	0
13 Office expenses	31,830	29,602	2,228	0
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel	3,549	318	3,231	0
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	6,776	6,302	474	0
20 Interest	52,110	52,110	0	0
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	92,295	85,834	6,461	0
23 Insurance	14,405	13,397	1,008	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	21,094	21,094	0	0
b MEALS PROVIDED	136,916	136,916	0	0
c TRANSPORTATION	455,582	423,691	31,891	0
d MAINTENANCE/REPAIRS	20,972	19,504	1,468	0
e All other expenses	139,802	85,306	18,913	35,583
25 Total functional expenses. Add lines 1 through 24e	2,472,675	2,187,034	174,392	111,249
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)				

Acacia Adult Day Services
Grant Report to the **SL Gimbel Foundation**
for **\$12,988** to support the Adult Day Health Care Program
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Grant Report Questions

1. Acacia Adult Day Services
2. Grant # 20140331 GIMB2
3. Grant Period: July 1, 2014-June 30, 2015
4. Although Acacia is located in Garden Grove, CA, the agency serves 24+ cities in Orange County and surrounding communities.
5. Mallory Vega, Executive Director
6. (714)530-1566
7. mvega@acacia-services.
8. You provided 10 participants with 39 days of Adult Day Health Care.
9. Objective I: Serve at least 175 adult participants who require medical intervention as part of their daily care. Outcome: 180 participants served.
Objective II: At least 75% of participants will maintain or improve 2 or more of their functional ADLs. Outcome: 79% of the participants met this objective.
Objective III: At least 75% of participants will maintain or improve 2 or more of their functional IADLS. 79% of the participants met this objective.
10. The participants attending the Adult Day Health Care program are coming into the program with more health issues, the need for more personal care and interventions, increased number of medications, and overwhelmed caregivers. As a result our resources of staff and facilities are being pushed to their limits.
11. In order to meet the needs of our participants and their caregivers, Acacia is participating in two funded programs utilizing Nurse Navigators who go out to our participants' homes to augment our current nursing staff. The purpose is to test a three tiered care approach to provide both early interventions in order to address "red flag health issues" and to intervene when participants become medically frail to reduce emergency room visits, hospital stays, and long term care placement. It is hoped through this approach that we can contract with managed health plans to provide increased care and services to their members and receive a reimbursement rate that enables us to increase staffing and properly maintain our facilities.
12. As a result of the added resources identified in question 11, we've been able to initiate twice monthly Health Literacy classes for our participants. This proactive approach is increasing our participants' knowledge of their health issues and desire to work with our adult day health care staff and Nurse Navigators to adjust their lifestyles.
13. This grant has provided our organization with funding needed to enable us to adjust and adapt our business model to the increased acuity levels of our participants.
14. As presented in our project budget, we did expend the funds we received from the SL Gimbel Foundation for the following expenses:
One Full Time Licensed Vocational Nurse (LVN) for 10 hours a week, under the supervision of the Registered Nurse (RN), provided medication disbursement and management, monitoring of blood pressure rates, monitoring of blood sugar levels, ready response to emergency situations,

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communication with participants' physicians, and a listening ear and appropriate response to any participant needing to discuss a medical issue.

One Full Time Certified Nurse's Aide for 10 hours a week, under the supervision of the RN and LVN, assisted with monitoring blood pressure rates, provided personal care, and monitored the participants at lunch to ensure proper intake of food.

One Part Time Program Aide for 10 hours a week, under the supervision of the Activities Supervisor, engaged participants in therapeutic activities such as art classes, cooking classes, exercise classes, brain fitness classes.

Benefits provided staff included holidays, sick leave, vacation, and health insurance for those qualifying.

Supplies included paper products for the snack program, art classes, cooking classes, glucose testing strips, and other medical supplies.

Support documents will be sent as requested.

15. Success Story:

Acacia participant, Mary Lou, has been attending Acacia for about 8 months. At 81 years old, she has been diagnosed with chronic heart failure and degenerative joint disease and depends on her daughter for assistance with her daily needs. Mary Lou was always an active person who enjoyed helping others, she was a foster mother to teenage children for several years and was having a difficult time adjusting to her loss of independence. At Acacia, Mary started talking to other participants, sharing her interests, hobbies and past experiences and encouraging others to share. Mary Lou discovered that a group of ladies liked to crochet and knit and with the support of staff members decided to start a crochet group. Under Mary's leadership the daily group has blossomed and become a special place for friendship, sharing and encouragement for all those participating. Mary Lou also revealed that she was a former journalism major and announced that she will take the lead in writing a center newsletter, titled, "Let's Talk," to share the interesting stories she learns about her friends in Mary's Crochet Club. Mary Lou has definitely found a renewed sense of independence and purpose in life, you'll find her with her press badge on, welcoming participants and making new friends.

MARY LOU'S NEWSLETTER IS ATTACHED.

Let's Talk Newsletter

Hi Ya'll

My name is Mary Lou. I'm a participant here at Acacia Adult Day Services and I'm enjoying making new friends.

I live with my daughter and her family. I have 3 grown kids, 9 grandchildren, 10 great grandchildren and 1 great, great grandchild.

Before retiring, I was a drug and alcoholism counselor, an in home caregiver and I ran my own licensed day care center for tots. But what I am most proud of is that I had a licensed foster home for teenage boys.

The staff is trying to extend their activities at the center. We've already added a crochet club open to all. Just grab a crochet hook and start creating. Men - remember if Rosie Greer could do it you can too!

I've suggested that a newsletter would be welcomed, so now I guess I am a reporter.

If you have something you would like to discuss, tell me or an activities staff member. My office is the third picnic table in the court yard or I'll be at one of the many activities happening here at the center.

Tell us your story we want to get to know you! So let's talk!



Written by Mary Lou Hardin

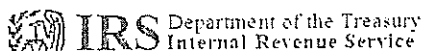
May 7, 2015

2015 S.L. GIMBEL FOUNDATION FUND

GRANT APPLICATION

ACACIA ADULT DAY SERVICES

PART B



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248205661
Aug. 23, 2011 LTR 4168C E0
95-3509323 000000 00
00014668
BODC: TE

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

Employer Identification Number: 95-3509323
Person to Contact: MS. JOHNSON
Toll Free Telephone Number: 1-877-829-5500

Dear TAXPAYER:

This is in response to your Aug. 12, 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 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.

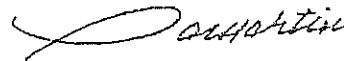
Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third 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.

0248205661
Aug. 23, 2011 LTR 4168C E0
95-3509323 000000 00
00014669

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,



S. A. Martin, Operations Manager
Accounts Management Operations



Strengthening Inland Southern California through Philanthropy

S. L. Gimbel Foundation Fund

August 26, 2015

BOARD OF DIRECTORS

Philip Savage IV
Chair of the Board

Sean Varner
Vice Chair of the Board

Pat Spafford, CPA
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D. Matthew Pim

Teresa Rhyne

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

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 **\$13,000** from the S.L. Gimbel Foundation. The **performance period for this grant is September 1, 2015 to August 31, 2016**. 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: To provide adult day health care services to disabled seniors who require daily assistance to remain independent. Please note grant funds do not cover overhead.

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 by September 15, 2016** and a copy will be available online.

We wish you great success and look forward to working with you during the grant performance period.

If you have any questions, please call me at 951-684-4192 ext. 114 or email me at ccudiamat@thecommunityfoundation.net.

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

2747 Acacia Adult Day Services 20150630 GIMB4



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

3700 Sixth Street, Suite 200 Riverside, California 92501
P: 951.241.7777 F: 951.684.1911 www.thecommunityfoundation.net

2015 S.L. Gimbel Foundation Fund

Grant Agreement

Organization: Acacia Adult Day Services

Grant Amount: \$ 13,000 **Grant Number:** 20150630

Grant Period: September 1, 2015 to August 31, 2016 (Evaluations due by September 15, 2016)

Purpose: **Adult Day Health Care Program: To provide adult day health care services to disabled seniors who require daily assistance to remain independent. Please note grant funds do not cover overhead.**

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.

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

09/02/15
Date

Executive Director
Title

Organization: 2747 Acacia Adult Day Services
Grant Number: 20150630

9/29/15

The Community Foundation

Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS September 29, 2015

Philip Savage IV
Chair of the Board

Sean Varner
Vice Chair of the Board

Pat Spafford, CPA
Chief Financial Officer

Sergio Bohon
Secretary of the Board

Glenda Bayless

Dr. Paulette Brown-Hinds

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D. Matthew Pim

Teresa Rhyne

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

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

Dear Ms. Vega:

The Community Foundation is pleased to enclose a grant check for **\$13,000** from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned. The completed Grant Evaluation form is due by September 15, 2016 and will be available online on The Community Foundations website under 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.

We greatly appreciate any help you can give us in publicizing the grant. **Please use the following credit in any grant announcements or materials funded by the grant: "The (name of project/program) is supported by a grant from The S. L. Gimbel 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.

If you have any questions, please contact me at 951-241-7777.

Sincerely,



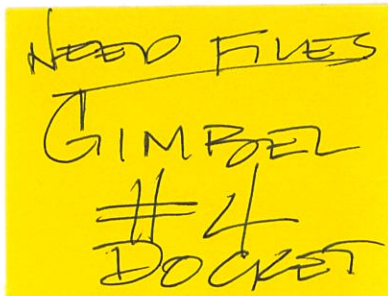
Celia Cudiamat
Executive Vice President of Programs

20150630

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GIMB4

Dr. Jonathan Lorenzo Yorba
President and CEO



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

The Community Foundation
 Strengthening Inland Southern California through Philanthropy
 3700 SIXTH STREET, SUITE 200
 RIVERSIDE, CA 92501
 951-241-7777 / FAX 951-684-1911

CITIZENS BUSINESS BANK
 A Financial Services Company
 3696 Main Street, Riverside, CA 92501
 90-3414-1222

EZShield™ Check Fraud Protection for Business

39674

PAY * Thirteen Thousand and no/100 *

TO THE ORDER OF

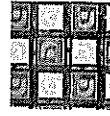
DATE

08/27/2015

AMOUNT

\$ ****13,000.00

Acacia Adult Day Services
 11391 Acacia Parkway
 Garden Grove, CA 92840



Celia Andramiat
Jonathan Lanza Yalca
 AUTHORIZED SIGNATURE

Security features. Details on back.

⑈039674⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

39674

2747	Acacia Adult Day Services	08/27/2015	039674	
20150630	08/25/2015 Adult Day Health Care Program			13,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		13,000.00	

CHECK TOTAL: \$ ****13,000.00

The Community Foundation

39674

2747	Acacia Adult Day Services	08/27/2015	039674	
20150630	08/25/2015 Adult Day Health Care Program			13,000.00
GIMB	S.L. Gimbel Foundation Advised Fund		13,000.00	

CHECK TOTAL: \$ ****13,000.00