



# 2014 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant: _____

20150044

## Organization / Agency Information

<b>Organization/Agency Name:</b> Hospice Austin <span style="color:red">21434</span>		
<b>Physical Address:</b> 4107 Spicewood Springs Rd Ste 100		<b>City/State/Zip</b> Austin, TX 78759
<b>Mailing Address:</b> 4107 Spicewood Springs Rd Ste 100		<b>City/State/Zip</b> Austin, TX 78759
<b>CEO or Director:</b> Marjorie Mulanax,		<b>Title:</b> Executive Director
<b>Phone:</b> 512-342-4721	<b>Fax:</b> 512-795-9053	<b>Email:</b> mmulanax@hospiceaustin.org
<b>Contact Person:</b> Holly Chacona, Development Coordinator		<b>Title:</b>
<b>Phone:</b> 512-342-4752	<b>Fax:</b> 512-795-9053	<b>Email:</b> hchacona@hospiceaustin.org
<b>Web Site Address:</b> www.hospiceaustin.org		<b>Tax ID:</b> 74-2200596

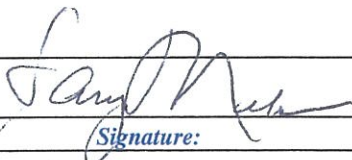
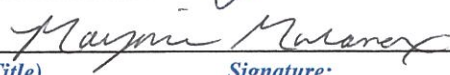
## Program / Grant Information

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

<b>Program / Project Name:</b> Hospice Austin's Charity and Sequestration Shortfall Care		
<b>Amount of Grant Requested:</b> \$25,000	<b>Total Organization Budget:</b> \$19,649,023	<b>Percentage of Organization's Total Budget used for Administration:</b> *13%
<b>Purpose of Grant Request (one sentence):</b> To support Hospice Austin in our mission to provide compassionate end-of-life services for every terminally ill patient who needs care, regardless of ability to pay or complexity of care.		
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> None		

\*Our accounting software is not set up to allow for real time allocation of administrative and indirect costs. The number above represents a manual allocation we provide to our auditor to compile our 990. Please see explanation on page 6.

## Signatures

Gary Nelson, President of the Board of Directors <i>Board President / Chair: (Print name and Title)</i>	 <i>Signature:</i>	11/24/2014 <i>Date:</i>
Marjorie Mulanax, Executive Director <i>Executive Director/President: (Print name and Title)</i>	 <i>Signature:</i>	2/29/14 <i>Date:</i>

## Hospice Austin Narrative

### I. Organization Background; Target Population:

A) Hospice Austin is a nonprofit organization that eases the physical, emotional and spiritual pain of any person in our community facing the final months of a serious illness by providing expert and compassionate care, education and bereavement support. Hospice Austin was established in 1979, and in 1986, became Medicare certified and expanded to serve four surrounding counties.

B) Hospice Austin was awarded the Anita & Earl Maxwell Lifetime Achievement Award for Ethics in Business in the Non-Profit category in 2012. Few hospices in the nation meet 100% of the need for charity hospice care in their communities. With community support, we have been doing so for over 30 years. Over the past three years, we have adopted high tech strategies that enable more immediate and responsive patient care, implemented Pet Peace of Mind, which enables even our most disabled patients to keep their pets at home with them. Last month, we initiated a special pediatrics program.

C) Hospice Austin's services include home-based and inpatient medical and nursing, spiritual and emotional support, social work, personal care, special therapies, volunteer and bereavement services. Our affiliated Central Texas Palliative Care Associates focus on palliative care and Support Source provides volunteer-driven services to patients who are not yet ready for hospice care, or who prefer to continue to receive curative treatment. Hospice Austin cares for over 1,700 patients per year and provides over 115,000 days of care. We also serve over 2,000 bereaved family members. Our patients range from newborns to centenarians and represent all ethnic and socio-economic backgrounds. Innovative grief programs are available to all bereaved persons in our community.

### II. Project Information:

A) In the last stages of a struggle with a life-limiting disease, patients may experience pain, depression, and spiritual crisis. Only when all of the patient's symptoms are managed can they experience what can be termed a "good" death—one that addresses the fear, anxiety, and isolation patients and their loved ones grapple with. It deals with the physical, emotional and spiritual needs of the patient. For those without adequate resources, a good death may be beyond reach. Lack of insurance or tapped out medical benefits and loss of employment cause patients from all walks of life to fall through the cracks of our fragmented health care system. Out-of-pocket expenses can devastate family finances so that even working or insured patients and families are at-risk. Medicare patients may be denied care elsewhere because their benefits do not compensate the full cost of their care. Hospice Austin's charity and uncompensated care project ensures that no terminally ill patient in our community is denied the services that can help them have a peaceful, pain-free and dignified death. Fundraising for this project is especially critical now with sequestration. At the current sequestration cut of 2%, we are experiencing a shortfall of \$23,000 a month in Medicare reimbursements.

B) 1. Our goal is to meet 100% of the need for hospice care in Central Texas and continue to ensure that no terminally ill patient in our community ends up "falling through the cracks" of the healthcare system.

#### 2. Objectives

Objective 1: Provide Coordination of End-of-Life Care

Activities: Patients and family members experience a continuity of care throughout the patient's length of stay, with one nurse identified as being in charge of care; Ensure that patients and

family members receive clear and consistent treatment information; Ensure that all members of the care team are familiar and current with the patient's medical history.

Objective 2: Symptom Control

Activities: Ensure that the patient is made as comfortable as possible, with adequate symptom control; Ensure that the family feels that the patient received the right amount of pain control and help with breathing problems; Keep the patient and family informed about all symptom treatments.

Objective 3: Attend to Family Needs

Activities: Provide emotional support both prior to and after the patient's death; Provide the *desired* amount of religious or spiritual support throughout the family's hospice experience.

3. This project is ongoing, but for this grant's purpose, we will track one year's activities. We anticipate serving 200 individuals in a year's time, providing 12,505 patient days of charity and uncompensated care with the following breakdown: 2 Children, 2 Youth, 66 Adults 130 Seniors. Each individual patient's needs are different and the scope of care can vary accordingly. A Hospice Austin patient's care may include any of the following services:

Registered nurses visit patients to provide care, evaluation, instruction and support; Certified Nurse Aide visits include personal hygiene care and assistance with activities of daily living; homemakers provide assistance with meal preparation, laundry and cleaning the patient's living area. Licensed social workers provide patient and family counseling as well as coordination with other community services and assistance with financial concerns. Chaplains are available to provide spiritual and religious support and specialists assist the patient and family as needed in areas such as nutritional counseling and physical, occupational or speech therapy. On-call assistance in nursing, spiritual care and social work is available 24 hours a day, 7 days a week. Hospice Austin's Christopher House provides a homelike alternative when symptom control is temporarily beyond that which can be handled at the patient's home. A team consisting of professionals and trained volunteers offers bereavement support to grieving families during the dying process and after the patient's death.

4. We compete with over 40 for-profit hospices in our service area. With greater financial resources, they can aggressively market to referral sources and often choose patients based on ability to pay or diagnosis. When for-profit hospices cherry-pick the profitable patients, they leave high medical need patients and uninsured patients to our care. The result is a troubling shift in Hospice Austin's payor mix as well as a shift in our average cost per patient. As noted in the *Journal of the American Medical Association*, "Patient selection of this nature leaves nonprofit hospice agencies disproportionately caring for the most costly patients. As a result, hospices serving the neediest patients may face difficult financial obstacles to providing appropriate care." Hospice Austin is the only truly accessible hospice in the community. To assure maximum outreach and accessibility, we regularly collaborate with partners such as Meals on Wheels, Austin Groups for the Elderly, AIDS Services of Austin, Any Baby Can, Easter Seals, Family and Travis County Jail. Supplementing our professional care is a team of over 400 trained volunteers who offer emotional support and non-medical practical assistance to patients and families. Volunteers may help by sitting with the patient, providing reassurance or companionship for patients and families and always being an attentive and sympathetic listener.

C) The project ensures that every terminally ill patient in our community has access to compassionate end-of-life care that improves or maintains their physical comfort, meets the emotional and spiritual needs of both patients and family members, assures that our patients' and family members' concerns are heard and addressed, and respects their privacy. Our patients are able to spend their remaining days of life as free from pain as possible, with dignity and, for most, in the familiar comfort of their own homes. The burden on the family members is also lightened. They receive comprehensive support in their roles as caregivers and continue receiving support during their bereavement. The measurement of

those outcomes is tracked through a national assessment and benchmark program, which aggregates and evaluates data through a survey answered by family members after the death of the patient. Our goal is to have 85% or more of the survey respondents give Hospice Austin top tier ratings on the following outcomes: Provide Coordination of Care; Pain Control; Attend to Family Needs; Patient Treated with Respect.

Our Program Quality department collects, analyzes, and interprets data to identify areas for further inquiry and inform quality improvement plans. Satisfaction is currently measured using the Family Evaluation of Hospice Care, a survey instrument used by hospices nationwide. Beginning in 2015, Hospice Austin will use a CMS (Centers for Medicaid and Medicare Services)-mandated family satisfaction survey to assess our results. The migration to the new assessment tool is expected to begin in January, with full implementation expected to begin April 1, 2015.

D) The Gimbel Foundation grant funds would underwrite 160 days of home-based care for charity care patients.

### **III. Project Future**

A) To meet our ongoing fundraising goals for this project, Hospice Austin uses a diversified approach that entails increased market share, high quality services that generate memorial gifts; donor cultivation to generate major gifts and planned giving; project grants submitted to foundations; special events and direct mail appeals. Our fundraising guild, The Friends of Hospice Austin, and the Hospice Austin Fund also generate financial support. We will continue using this diversified strategy to meet our goals to sustain the Charity and Sequestration Shortfall program.

### **IV. Governance, Executive Leadership and Key Personnel/Staff Qualifications**

A. Hospice Austin's Board of Directors' responsibilities include program oversight, setting strategic goals and policy related to access, operations and ethical issues. Hospice Austin's Executive Director acts as the chief administrative officer, subject to the policies set by the Board, and is responsible for the day to day operation of the agency. Committees include: Ethics: Comprised of diverse group of community members and staff who review ethical dilemmas related to end of life issues facing Hospice Austin patients and their families. Executive: Comprised of Officers and At Large Member(s). The Executive Committee is authorized to act on behalf of the full Board between Board meetings; Fiscal Management: Responsible for oversight of financial performance of agency; Governance: Responsible for effective governance of Board of Directors, including nominating process and Board education; Performance Improvement: Responsible for oversight of agency's performance improvement activities and outcomes; Personnel/Compensation: Responsible for oversight of personnel matters, including salaries and benefits, compensation, etc.

A) Describe the qualifications of key personnel/staff responsible for the project.

Executive Director – Marjorie Mulanax, MBA; Chief Medical Officer - Robert Friedman MD, FAAHPM; Chief Operating Officer – Paige Fletcher, RN, MSN, CHPN; Chief Financial Officer - Christine Reis, MBA, CPA; Director of Quality – Leanne Rhoades, RN, BSN; Director of Clinical Services – Tracy King, RN, BSN, CHPN; Director of Inpatient Care - Ron Patterson, RN, MSN; Director of Volunteers and Bereavement Services - Nancy Chester McCranie, MDIV; Director of Development - Robin Clemons, BBA\Finance.

## 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.

Line Item Description	Line Item Explanation (Formula/equation used as applicable. Example: 40 books @ \$100 each = \$4000)	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Administration Salaries (\$12.84-\$55.64/hr)	\$1,701,278 total agency administrators salaries x 10.7889% dedicated to charity and uncompensated care = \$183,542	**			\$183,542
Bereavement Salaries (\$14.13-\$25.48/hr)	\$109,241 total agency bereavement salaries x 10.7889% dedicated to charity and uncompensated care = \$11,785	**			\$11,785
Chaplains Salaries (\$18.80-\$21.06/hr)	\$431,995 total agency chaplain salaries x 10.7889% dedicated to charity and uncompensated care = \$46,605	**			\$46,605
Clinical Admin. Salaries (\$12.84-\$41.04/hr)	\$1,154,111 total agency clinical administrators salaries x 10.7889% dedicated to charity and uncompensated care = \$124,511	**			\$124,511
CNAs Salaries (\$11.68-\$13.08/hr)	\$809,779 total agency CNA salaries x 10.7889% dedicated to charity and uncompensated care = \$87,363	**			\$87,363
Development Salaries (\$15.54-\$41.04/hr)	\$335,143 total agency development salaries x 10.7889% dedicated to charity and uncompensated care = \$36,157	**			\$36,157
Kitchen Salaries (\$10.61-\$13.08/hr)	\$127,023 total agency kitchen staff salaries x 10.7889% dedicated to charity and uncompensated care = \$13,703	**			\$13,703
LVNs Salaries (\$17.09-\$19.15/hr)	\$270,434 total agency LVN salaries x 10.7889% dedicated to charity and uncompensated care = \$29,176	**	\$15,000 (funded)		\$29,176
Marketing Salaries (\$18.80-\$41.04)	\$128,418 total agency marketing salaries x 10.7889% dedicated to charity and uncompensated care = \$13,854	**			\$13,854
Misc Therapy Salaries (\$31.00-\$75.00/hr)	\$2,328 total agency miscellaneous therapists salaries x 10.7889% dedicated to charity and uncompensated care = \$251	**			\$251
Provider Liaison Salaries (\$22.75-\$33.92/hr)	\$241,032 total agency provider liaison salaries x 10.7889% dedicated to charity and uncompensated care = \$26,004	**			\$26,004
RNs Salaries (\$25.03-\$41.04/hr)	\$4,105,981 total agency registered nurse salaries x 10.7889% dedicated to charity and uncompensated care = \$442,971	**	\$25,000 (funded)	\$25,000	\$442,971
Social Workers Salaries (\$20.69-\$23.17/hr)	\$619,297 total agency social work salaries x 10.7889% dedicated to charity and uncompensated care = \$66,814	**			\$66,814

Support Source Salaries (\$17.10-\$19.15/hr)	\$43,778 total agency support source salaries x 10.7889% dedicated to charity and uncompensated care = \$4,723	**			\$4,723
Volunteer Dept. Salaries (\$17.10-\$28.03/hr)	\$170,161 total agency volunteer department salaries x 10.7889% dedicated to charity and uncompensated care = \$18,358	**			\$18,358
*Payroll Taxes	7.33% of \$1,105,817 total salaries for Charity and uncompensated care = \$80,965	**			\$80,965
*Staff Insurance	10.80% of \$1,105,817 total salaries for Charity and uncompensated care = \$119,451	**			\$119,451
*Staff Retirement	3.42% of \$1,105,817 total salaries for Charity and uncompensated care = \$37,839	**			\$37,839
*Occupational Injury (worker's comp)	.63% of \$1,105,817 total salaries for Charity and uncompensated care = \$7,025	**			\$7,025
*Employee Assistance Program	.05% of \$1,105,817 total salaries for Charity and uncompensated care = \$775	**			\$775
Mileage	\$494,888 total mileage x 10.7889% dedicated to charity and uncompensated care = \$53,391	**			\$53,391
Parking	\$3,181 x 10.7889% dedicated to charity and uncompensated care = \$343	**			\$343
Ambulance	\$90,276 x 10.7889% dedicated to charity and uncompensated care = \$9,739	**			\$9,739
Bio Hazard Waste Disposal	\$7,320 x 10.7889% dedicated to charity and uncompensated care = \$790	**			\$790
Durable Medical Equipment	\$655,247 x 10.7889% dedicated to charity and uncompensated care = \$70,691	**			\$70,691
Kitchen Food & Other Supplies	\$27,050 x 10.7889% dedicated to charity and uncompensated care = \$2,918	**			\$2,918
Laboratory	\$61,057 x 10.7889% dedicated to charity and uncompensated care = \$6,587	**			\$6,587
Linen Service	\$1,034 x 10.7889% dedicated to charity and uncompensated care = \$112	**			\$112
Medical Director Expense	\$802,308 x 10.7889% dedicated to charity and uncompensated care = \$86,557	**			\$86,557
Medications	\$720,479 x 10.7889% dedicated to charity and uncompensated care = \$77,729	**			\$77,729
Pharmacy Delivery	\$119,096 x 10.7889% dedicated to charity and uncompensated care = \$12,849	**			\$12,849
Pharmacy Management	\$299,998 x 10.7889% dedicated to charity and uncompensated care = \$32,365	**			\$32,365
Parenteral	\$130,098 x 10.7889% dedicated to charity and uncompensated care = \$14,036	**			\$14,036

Medical Supplies Nutritional Supps	\$407,750 x 10.7889% dedicated to charity and uncompensated care = \$43,990	**			\$43,990
Pagers/Telephone	\$100,690 x 10.7889% dedicated to charity and uncompensated care = \$10,863	**			\$10,863
Medical Gases	\$25,683 x 10.7889% dedicated to charity and uncompensated care = \$4,834	**			\$2,771
Emergency Room/Outpatient Expense	\$44,811 683 x 10.7889% dedicated to charity and uncompensated care = \$4,834	**			\$4,834
Cable TV & Internet (inpatient facility)	\$3,691.44 683 x 10.7889% dedicated to charity and uncompensated care = \$398	**			\$398
Recruiting-Patient Care	\$8,070 683 x 10.7889% dedicated to charity and uncompensated care = \$871	**			\$871
Palliative Chemotherapy	\$5,127 683 x 10.7889% dedicated to charity and uncompensated care = \$553	**			\$553
Palliative Radiation	\$1,200 683 x 10.7889% dedicated to charity and uncompensated care = \$129	**			\$129
PT & OT	\$12,455 683 x 10.7889% dedicated to charity and uncompensated care = \$1,344	**			\$1,344
Therapies-Other	\$13,030 x 683 x 10.7889% dedicated to charity and uncompensated care = \$1,406	**			\$1,406
Translation/Patient Communications	\$18,270 x 10.7889% dedicated to charity and uncompensated care = \$1,971	**			\$1,971
Bereavement Counsel Supplies	\$129 x 10.7889% dedicated to charity and uncompensated care = \$14	**			\$14
Grocery & Other Assistance	\$20,615 x 10.7889% dedicated to charity and uncompensated care = \$2,224	**			\$2,224
COBRA Payment Assistance	\$2,462 x 10.7889% dedicated to charity and uncompensated care = \$266	**			\$266
Literature for Patients	\$3,634 x 10.7889% dedicated to charity and uncompensated care = \$392	**			\$392
Uniforms	\$830 x 10.7889% dedicated to charity and uncompensated care = \$90	**			\$90
Pet Peace of Mind	\$742 x 10.7889% dedicated to charity and uncompensated care = \$80	**			\$80
Janitorial (inpatient facility)	\$30,492 x 10.7889% dedicated to charity and uncompensated care = \$3,290	**			\$3,290
Landscaping (inpatient facility)	\$6,660 x 10.7889% dedicated to charity and uncompensated care = \$719	**			\$719
Pest Control (inpatient facility)	\$2,284 x 10.7889% dedicated to charity and uncompensated care = \$264	**			\$246
Maintenance/Repairs (inpatient facility)	\$96,883 x 10.7889% dedicated to charity and uncompensated care = \$10,452	**			\$10,452
Security/Alarm System (inpatient facility)	\$63,365 x 10.7889% dedicated to charity and uncompensated care = \$6,836	**			\$6,836

Property Taxes (inpatient facility)	\$7,255 x 10.7889% dedicated to charity and uncompensated care = \$783	**			\$783
Solid Waste Disposal (inpatient facility)	\$5,413 x 10.7889% dedicated to charity and uncompensated care = \$584	**			\$584
Utilities-Electric (inpatient facility)	\$69,606 x 10.7889% dedicated to charity and uncompensated care = \$7,509	**			\$7,509
Utilities-Water (inpatient facility)	\$31,167 = x 10.7889% dedicated to charity and uncompensated care = \$3,362	**			\$3,362
Utilities-Gas (inpatient facility)	\$10,480 x 10.7889% dedicated to charity and uncompensated care = \$1,131	**			\$1,131
Contract Labor (Administrative)	\$41,594 x 10.7889% dedicated to charity and uncompensated care = \$4,487	**			\$4,487
Contract Labor (Patient-related)	\$67,334 x 10.7889% dedicated to charity and uncompensated care = \$4,487	**			\$7,265
Employee Relations/Events	\$3,615 x 10.7889% dedicated to charity and uncompensated care = \$390	**			\$390
Legal & Accounting	\$121,612 x 10.7889% dedicated to charity and uncompensated care = \$13,120	**			\$13,120
Consulting	\$47,822 x 10.7889% dedicated to charity and uncompensated care = \$5,159	**			\$5,159
Answering Service	\$5,912 x 10.7889% dedicated to charity and uncompensated care = \$638	**			\$638
Bank Service Fees	\$25,769 x 10.7889% dedicated to charity and uncompensated care = \$2,780	**			\$2,780
Computer Support/Maintenance	\$188,039 x 10.7889% dedicated to charity and uncompensated care = \$20,287	**			\$20,287
Continuing Education	\$43,709 x 10.7889% dedicated to charity and uncompensated care = \$3,147	**			\$3,147
Courier/Delivery to/from HACH and WC	\$10,856 x 10.7889% dedicated to charity and uncompensated care = \$1,171	**			\$1,171
Depreciation	\$173,573 x 10.7889% dedicated to charity and uncompensated care = \$18,726	**			\$18,726
Driving Records	\$7,680 x 10.7889% dedicated to charity and uncompensated care = \$829	**			\$829
Dues, Licenses, Subscriptions	\$70,763 x 10.7889% dedicated to charity and uncompensated care = \$7,634	**			\$7,634
Minor Equipment/Software/ Furniture	\$41,009 x 10.7889% dedicated to charity and uncompensated care = \$4,424	**			\$4,424
Insurance-Property	\$25,095 x 10.7889% dedicated to charity and uncompensated care = \$2,707	**			\$2,707
Insurance-Liability, D & O	\$125,858 x 10.7889% dedicated to charity and uncompensated care = \$13,578	**			\$13,578



Advertising\Brochures\ Promo Items	\$19,265 x 10.7889% dedicated to charity and uncompensated care = \$2,078	**			\$2,078
Meals & Entertainment	\$20,150 x 10.7889% dedicated to charity and uncompensated care = \$2,174	**			\$2,174
Meeting Expenses	\$6,656 x 10.7889% dedicated to charity and uncompensated care = \$718	**			\$718
Mileage and Travel (Admin)	\$34,397 x 10.7889% dedicated to charity and uncompensated care = 5,280	**			\$5,280
Parking (Admin)	\$216.00 x 10.7889% dedicated to charity and uncompensated care = \$23	**			\$23
Advertising/ Publications	\$5,124.00 x 10.7889% dedicated to charity and uncompensated care = \$553	**			\$553
Printing-Forms	\$66,193 x 10.7889% dedicated to charity and uncompensated care = 7,141	**			\$7,141
Miscellaneous Expense	\$318 x 10.7889% dedicated to charity and uncompensated care = \$34	**			\$34
Postage	\$36,763 x 10.7889% dedicated to charity and uncompensated care = \$3,966	**			\$3,966
Recruiting- Administrative	\$7,669 x 10.7889% dedicated to charity and uncompensated care = \$827	**			\$827
Copier Contract	\$18,999 x 10.7889% dedicated to charity and uncompensated care = \$2,050	**			\$2,050
Storage-Records	\$15,739 x 10.7889% dedicated to charity and uncompensated care = \$1,698	**			\$1,698
Office Supplies	\$44,571 x 10.7889% dedicated to charity and uncompensated care = \$4,809	**			\$4,809
Telephone	\$115,926 x 10.7889% dedicated to charity and uncompensated care = \$12,507	**			\$12,507
e-Fax	\$1,948 x 10.7889% dedicated to charity and uncompensated care = \$210	**			\$210
Confidential Document Destruction	\$4,389 x 10.7889% dedicated to charity and uncompensated care = \$473	**			\$473
Training, including Computer	\$27,713 x 10.7889% dedicated to charity and uncompensated care = \$2,990	**			\$2,990
TOTAL				***\$40,000	\$1,980,960

\* Total benefits are generally calculated at 21% but they can vary due to insurance costs, 401K contributions, use of full time vs PRN (as needed) staff, etc. If paid time off (holidays/vacation/sick) is computed as a benefit cost, the percentage increases to 34%.

\*\* Hospice Austin has a diversified funding stream that includes grants, appeals, giving day proceeds, special events, etc. The organization is committed to supporting the project.

\*\*\* Committed funding. Several grants are still pending and more will be applied for in the coming months.

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

*Secured/Awarded*

Name of Funder: Foundation, Corporation, Government	Amount
RAM Foundation	\$15,000
Lola Wright Foundation	\$25,000

*Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
<i>*St. David's Foundation</i>	<i>\$175,000</i>	<i>12/14</i>
<i>*Texas Oncology</i>	<i>\$35,000</i>	<i>12/14</i>
<i>*Topfer Family Foundation</i>	<i>\$32,500</i>	<i>12/14</i>
<i>*Austin Community Foundation</i>	<i>\$25,000</i>	<i>3/15</i>
<i>*Donald D. Hammill Foundation</i>	<i>\$15,000</i>	<i>3/15</i>
<i>Shield-Ayres Foundation</i>	<i>\$15,000</i>	<i>7/15</i>

\*These funders all have a multi-year history of giving to this project.

**VII. Financial Analysis**

Agency Name: Hospice Austin

Most Current Fiscal Year (Dates): From January 1, 2013 To: December 31, 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.

Program Expenses	/Total Operating Expenses	= Program Expense Ratio
\$18,624,218	\$21,962,823	84.8%

990: Part IX, Column B, Line 25      990: Part IX, Column A, Line 25

Adminstrative Expense (100%-Program Expense ratio) per 990 above	Percentage of Organization's <u>Current</u> Total Budget used for Administration (from cover page)	Differential
13%	*	*%

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

\*Our accounting software is not set up to allow for real-time allocation of administrative/indirect costs such as benefits, payroll taxes, utilities, insurance, etc. During preparation of our annual financial audit/IRS form 990, a manual allocation is conducted. Depending on the expense category, the allocation is based on salary dollars (eg. for employee benefits, payroll taxes, etc.), on FTEs (for liability insurance, information technology, etc.) and on square footage (for depreciation) etc. The Statement of Functional Expenses is prepared by senior accounting staff and reviewed by the auditor.

**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>
\$5,837,898	\$1,850,612	\$1,748,872	4.4

**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>
\$84,305	\$69,407

**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	\$1,440,453	6.53%	Program Fees	\$19,646,590	89.11%
Fundraising/Special Events	\$156,714	0.71%	Interest Income	\$57,113	0.26%
Corp/Foundation Grants	\$487,772	2.21%	Grant from HA Fund:	\$171,000	.78%
Government Grants	\$0	0.00%	Other revenue:	\$87,486	.40%

**Notes:**

**VIII. Application submission check list:**

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



Hospice Austin  
Your comfort. Our calling.

**BOARD OF DIRECTORS  
2014**

**OFFICERS:**

**Chairman of the Board:** Gary Nelon  
**Vice Chair:** Helayne O'Keiff  
**Secretary:** Scott Rubel  
**Treasurer:** Nannette Overbeck

**Barbara Budde**

Director of Social Concerns &  
Parish Social Ministry  
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Austin, TX 78723  
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512-499-4215 (fax)  
[jpankratz@utsystem.edu](mailto:jpankratz@utsystem.edu)

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Administrator, Clinical Education Center at  
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743-8212 (mobile)  
[YVandyke@seton.org](mailto:YVandyke@seton.org)

**Honorary****John McCarthy**

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Austin, TX 78731  
476-4888 (work)  
452-6601 (home)  
452-5043 (fax)  
[bishopjmc@austindiocese.org](mailto:bishopjmc@austindiocese.org)

Internal Revenue Service  
District Director

Department of the Treasury

P. O. Box 2508  
Cincinnati, OH 45201

Date: **NOV 23 1998**

Hospice Austin  
4107 Spicewood Springs Rd No 100  
Austin, TX 78759

Person to Contact:  
Ms R Parker  
Telephone Number:  
877-829-5500  
Fax Number:  
513-684-5936  
Federal Identification Number:  
74-2200596

Dear Sir or Madam:

This is in response to your inquiry received July 6, 1998 regarding your name change. Please note we have corrected our records to reflect the name as shown above. We have recorded this change as part of your permanent record.

Our records indicate that a determination letter issued in October of 1981 granted your organization exemption from federal income tax under section 501(c)(3) of the Internal Revenue Code. That letter is still in effect.

Based on information subsequently submitted, we classified your organization as one that is not a private foundation within the meaning of section 509(a) of the Code because it is an organization described in section 509(a)(1) and 170(b)(1)(A)(vi).

This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's sources of support, or its character, method of operations, or purposes have changed, please let us know so we can consider the effect of the change on the exempt status and foundation status of your organization.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of \$20 a day, up to a maximum of \$10,000, when a return is filed late, unless there is reasonable cause for the delay.

All exempt organizations (unless specifically excluded) are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more paid to each employee during a calendar year. Your organization is not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Hospice Austin  
74-2200596

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes.

Donors may deduct contributions to your organization as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to your organization or for its 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.

Your organization is not required to file federal income tax returns unless it is subject to the tax on unrelated business income under section 511 of the Code. If your organization is subject to this tax, it must file an income tax return on the Form 990-T, Exempt Organization Business Income Tax Return. In this letter, we are not determining whether any of your organization's present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

Because this letter could help resolve any questions about your organization's exempt status and foundation status, you should keep it with the organization's permanent records.

Please direct any questions to the person identified in the letterhead above.

This letter affirms your organization's exempt status.

Sincerely,

A handwritten signature in black ink, appearing to read "Ashley Bullard", written over a dotted grid background.

Ashley Bullard  
District Director



The  
Community  
Foundation

Serving the Counties of Riverside and San Bernardino

*S. L. Gimbel Foundation Fund*

BOARD OF DIRECTORS

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*Vice Chair of the Board*

Pat Spafford, CPA  
*Chief Financial Officer*

Sergio Bohon  
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Glenda Bayless

Dr. Paulette Brown-Hinds

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*Immediate Past Board Chair*

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Stanley Grube

Kirk Harms

Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Dr. Henry Shannon

Beverly Stephenson

Dr. Jonathan Lorenzo Yorba  
President and CEO

March 6, 2015

Ms. Marjorie Mulanax  
Executive Director  
Hospice Austin  
4107 Spicewood Springs Rd. Suite 100  
Austin, TX 78759

Dear Ms. Mulanax:

Congratulations! A grant has been approved for **Hospice Austin** in the amount of **\$25,000** from the S.L. Gimbel Foundation. The **performance period for this grant is March 1, 2015 to February 28, 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:

*Charity and Sequestration Shortfall Care: To provide compassionate end-of-life services for every terminally ill patient who needs care, regardless of ability to pay or complexity of care.*

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 March 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](mailto:ccudiamat@thecommunityfoundation.net).

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

21436 Hospice Austin 20150044 GIMB1



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





Hospice Austin

Your comfort. Our calling.

Telephone:  
(512) 342-4700

Toll Free:  
(800) 445-3261

Fax:  
(512) 795-9053

Main Address  
4107 Spicewood Springs Rd.  
Suite 100  
Austin, TX 78759

Hospice Austin's  
Christopher House  
2820 E. MLK, Jr. Blvd.  
Austin, TX 78702

Williamson County  
102 West Morrow St.  
Suite 204  
Georgetown, TX 78626

[HospiceAustin.org](http://HospiceAustin.org)

March 18, 2015

Celia Cudiamat  
Executive Vice President-Programs  
The Community Foundation  
3700 Sixth St., Suite 200  
Riverside, CA 92501

Dear Ms. Cudiamat,

Thank you so much for the very generous grant in support of our Charity and Sequestration Shortfall Care Project. We are thrilled to receive funding from the S.L. Gimbel Foundation Fund of The Community Foundation!

Few hospices in the country are able to provide charity care to everyone who needs it. We have always believed that access to compassionate end of life care is important and it becomes more so as the population ages. However, we cannot provide those services without remarkable support. We are very lucky to now count the S.L. Gimbel Foundation Fund of The Community Foundation among our supporters. I look forward to reporting on the impact of project.

On behalf of our patients and families, volunteers and staff, I extend our heartfelt thanks to you and to everyone at The Community Foundation for this very generous grant!

Sincerely,

Marjorie Mulanax  
Executive Director

---

**2015 S.L. Gimbel Foundation Fund**

**Grant Agreement**

**Organization:** Hospice Austin

**Grant Amount:** \$ 25,000                      **Grant Number:** 20150044

**Grant Period:** March 1, 2015 to February 28, 2016 (Evaluations due March 15, 2016)

**Purpose:** Charity and Sequestration Shortfall Care: To provide compassionate end-of-life services for every terminally ill patient who needs care, regardless of ability to pay or complexity of care.

**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.**

*Martorie Mulanax*  
Signature

3/17/15  
Date

MARTORIE MULANAX  
Printed Name

EXECUTIVE DIRECTOR  
Title

Organization: 21436 Hospice Austin  
Grant Number: 20150044

*Handwritten signature and date: 3/25/15*



# The Community Foundation

Serving the Counties of Riverside and San Bernardino

## S. L. Gimbel Foundation Fund

### BOARD OF DIRECTORS

March 25, 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

Rabbi Hillel Cohn

James Cuevas  
Immediate Past Board Chair

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Teresa Rhyne

Dr. Henry Shannon

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Ms. Marjorie Mulanax  
Executive Director

Hospice Austin  
4107 Spicewood Springs Rd. Suite 100  
Austin, TX 78759

Dear Ms. Mulanax:

The Community Foundation is pleased to enclose a grant check for **\$25,000** 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 March 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 951-684-4194.

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

20150044

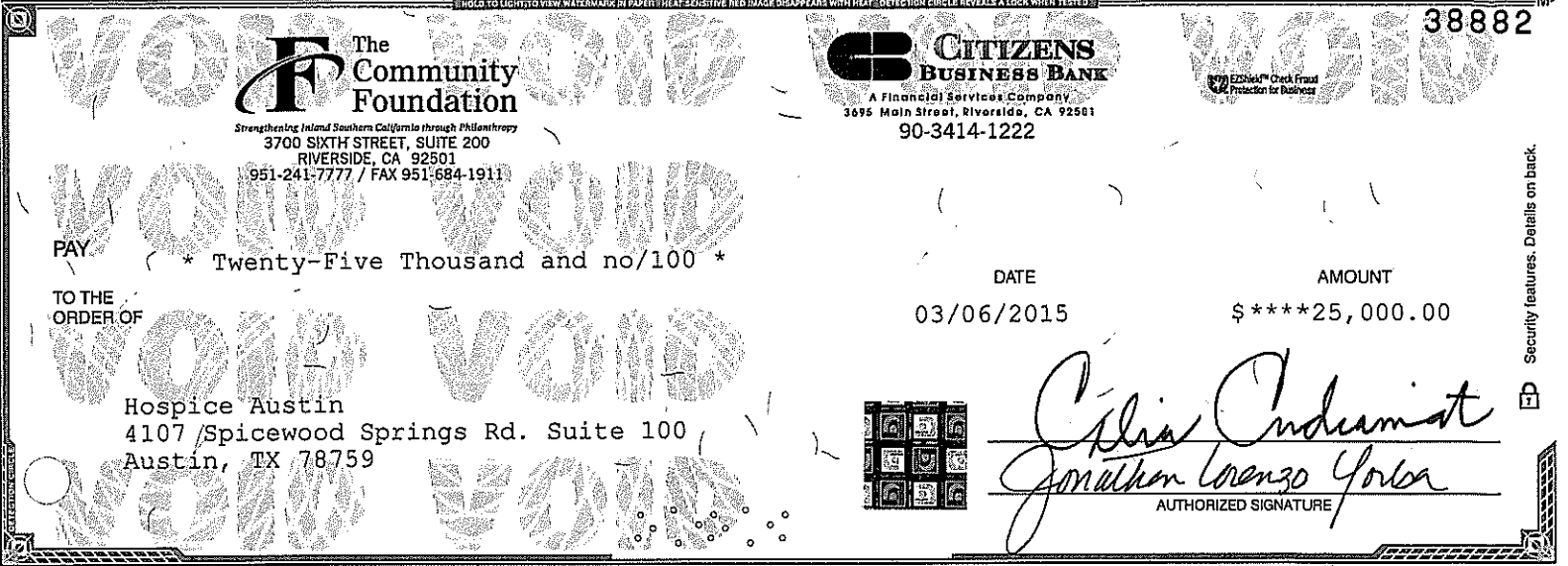
38882

GIMBI

Dr. Jonathan Lorenzo Yorba  
President and CEO



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



38882

**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  
3695 Main Street, Riverside, CA 92501  
90-3414-1222

EMV<sup>®</sup> Check Fraud Protection for Business

PAY \* Twenty-Five Thousand and no/100 \*

TO THE ORDER OF

Hospice Austin  
4107 Spicewood Springs Rd. Suite 100  
Austin, TX 78759

DATE 03/06/2015 AMOUNT \$\*\*\*\*25,000.00



*Celia Andueza*  
*Jonathan Lorenzo Yorba*  
AUTHORIZED SIGNATURE

Security features. Details on back.

⑈038882⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation		38882
21436	Hospice Austin	03/06/2015 038882
20150044	03/04/2015 Charity and Sequestration Shortfall Care	25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund	25,000.00

CHECK TOTAL: \$\*\*\*\*25,000.00

The Community Foundation		38882
21436	Hospice Austin	03/06/2015 038882
20150044	03/04/2015 Charity and Sequestration Shortfall Care	25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund	25,000.00

CHECK TOTAL: \$\*\*\*\*25,000.00