



# 2015 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:  
Grant #: 20150637

## Organization / Agency Information

<b>Organization/Agency Name:</b> Hospice of San Luis Obispo County 19018		
<b>Physical Address:</b> 1304 Pacific Street		<b>City/State/Zip:</b> San Luis Obispo, CA 93401
<b>Mailing Address:</b> S/A		<b>City/State/Zip:</b>
<b>CEO or Director:</b> Kris Kington-Barker		<b>Title:</b> Executive Director
<b>Phone:</b> (805) 544-2266	<b>Fax:</b> (805) 544-6573	<b>Email:</b> kriskington@hospiceslo.org
<b>Contact Person:</b> Kris Kington-Barker		<b>Title:</b> Executive Director
<b>Phone:</b> (805) 544-2266 x 215	<b>Fax:</b> (805) 544-6573	<b>Email:</b> kriskington@hospiceslo.org
<b>Web Site Address:</b> www.hospiceslo.org		<b>Tax ID:</b> 95-3195126

## Program / Grant Information

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

<b>Program/Project Name:</b> Hospice of San Luis Obispo County			<b>Amount of Grant Requested:</b> \$25,000
<b>Total Organization Budget:</b> 914,500	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> 83%	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C/ Column A x 100):</b> 11.63%	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b> 16.50%
<b>Purpose of Grant Request (one sentence):</b> Funding to support services for individuals coping with life limiting and/or terminal illness who are without financial resources for respite care, end of life vigil support, counseling, emotional support and education.			
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> \$2012 Received \$24,000 grant \$2013 Received \$25,000 grant			

## Signatures

<b>Board President / Chair: (Print name and Title)</b> David W. Leece, MD, President	<b>Signature:</b> 	<b>Date:</b> 7/2/15
<b>Executive Director/President: (Print name and Title)</b> Kris Kington-Barker, Executive Director	<b>Signature:</b> 	<b>Date:</b> 7/2/15

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

**I. Organization Background; Target Population:**

A) Hospice of San Luis Obispo County (Hospice SLO) is a *volunteer* (non medical) hospice organization and has been providing end of life support services for 38 years. Hospice SLO has continued with its original model and mission since 1977. All services are provided at no charge to clients and we do not bill insurance. Our income is based on donations, bequests, grants and fund raising. We currently have a core staff of 4 full time and 7 part-time (ranging from 10 – 24 hr/wk) employees and over 180 volunteers who serve the entire county. We provide respite care, emotional and practical support; grief counseling; support group; workshops and classes from two office locations and throughout the community. In keeping with its core mission, Hospice SLO remains the only hospice agency in the county providing in-home respite support to those with life limiting or terminal illness who have greater than 6 months prognosis or are continuing to pursue curative care regardless of prognosis or have been discharged from Medicare-reimbursed hospice agencies. Our agency works collaboratively with all local Medicare certified hospice and home health agencies to serve as both a bridge and safety net agency for clients as they ride a roller coaster of declining health. Because we do not charge for any of our services, there is never any conflict or discussion regarding “who will get paid”

B) 1. In fiscal year 2014 (July 2013 – June 2014) the following services were provided:

**Grief Counseling Sessions (Child, Adult, Family)**

*482 New Clients            3412 Sessions            4220 Hours*

Counseling provided by 5 paid staff and 10 volunteers who are licensed therapists or supervised MFT and MSW interns.

**Support Groups:**

*362 groups                    543 hours*

Provided by 3 paid staff and 14 volunteers

**In-Home Support**

*87 Clients                    1131 visits            2587 hours*

This does not include vigil clients when services were provide in hospitals or care facilities.

2 staff members 85 in home volunteers

**Pet Peace of Mind**

Serve an *average of 5 clients per month* with additional 2 in foster care.

18 volunteers

**Outreach and Trainings**

*1060 hours*

Provided by 7 staff, 9 board members and 50+ other volunteers

2. Over the past 3 years we have seen a steady increase in clients who are terminated from medical hospice services because they fail to meet the criteria of continued steady decline and those with severely life limiting illnesses with a long trajectory until death, Alzheimer’s and Parkinson’s in particular. These illnesses are exhaustive for the family and caregiver and they

fall between the cracks of the medical system. We have been focusing increased efforts for these clients and their families.

C) We serve San Luis Obispo County with a population of 279,003 and an area of 3298 sq. miles. 65% of the population is between the ages of 18-64 with the population skewing older than the California average age (17% over 60 vs. California average of 12.5%). Our services are offered to anyone of any age. We provide grief counseling for clients and families receiving care through our in-home services however over 50% of our counseling clients are coping with anticipatory grief or loss resulting from a sudden, traumatic, accidental death, a suicide or the illness and death of someone we have never served as a client. We *do not* limit services only to those coping with a recent loss; many of our clients have complicated grief. Our in-home clients receive our services for longer than is typically seen with a medical hospice. Sometimes for 1-2 years. Once medical hospice support is brought in, we often team with the other agency to continue providing an additional level of care.

## **II. Project Information:**

### **A) Statement of Need**

When surveyed regarding where they prefer to die if they had a choice, the majority express a desire to die at home with friend/family. However many families and caregivers are poorly prepared emotionally, frightened and exhausted resulting in 1 out of 4 people in California transferred to a hospital or care facility before they die where they are often cared for by medical care providers rather than dying at home. Dying and death in our culture have been pushed into the acute healthcare setting often resulting in patients at the end of life in an environment they do not want, frightened and isolated with loss of control and less participation in their end of life choices and discussions. After a death occurs

### **B) Project Goal, Objectives and Methodology**

1. Expand San Luis Obispo County's end of life care options through a robust approach to guiding and supporting dying people and their loved ones in the final phase of a terminal illness with a unique and comprehensive focus on planning prior to final days/hours, conducting supported vigils, reprocessing a death with loved ones afterwards and follow up. These services will be offered whether hospice care is rendered at home, in acute care and long term care facilities. This need will be met by bringing the highest certification standards for end of life doulas to the community and provide training and certification for current vigil volunteers through the International End of Life Doula Association (INELDA) With this level of certification a doula will work in hospice programs and other institutional setting. 2. Enhanced the training and services offered by an in-home Grief Companion program.

#### **2. Stated Objectives**

*Objective I:* Develop the necessary infrastructure for a Certified Vigil Doula (CVD) Program based on the International End of Life (INELDA) model.

*Activities:* Contract with INELDA to guide Hospice SLO through the management and logistic steps of setting up a CVD educating staff, creating forms and policy and procedure processes and documents including collaboration; communication with other medical providers and agencies.

*Objective II:* Identify, recruit and train volunteers and staff in the End of Life Doula Training with goal of 30-45 Certified Vigil Doulas and 2-4 Certified Lead Doulas (CLD).

*Activities:* Provide 22 hour comprehensive Certified Vigil Doula training over the course of a 3-day weekend facilitated by INELDA. Identify and train CLDs to supervise program and oversee and support Vigil Doulas. The training will be offered 6 months later with additional training and follow up by INELDA in between for Lead Doulas. Network and collaborate with existing

medical to acquaint with the program, INELDA training and certification, services offered how to refer and how to access

*Objective III:* Revise Grief Companion program to offer as support to those grieving who are unable to attend group or individual counseling in a counseling center after the death.

*Activities:* Update Grief Companion program training manual, policies and procedures, recruit volunteers, facilitate training; provide ongoing supervision and in-service training for volunteers.

3. Who Will It Serve: Doula services will be made available to community residents of any age who are dying and their families. Based on our vigil experience we expect the services to be equally utilized by male and females; and 60% of the clients to be over the age of 75. We do not initially expect pediatric patients. The Grief Companion program will be offered to family members grieving the death of a family member who is unable to access services remotely. This will focus heavily on elderly clients and those with physical limitations that reduce mobility.

4. Community Collaboration: Both CVD and Grief Companion program enhances all existing palliative care and hospice programs. The comprehensive training costs and infrastructure to maintain are consistent with the Hospice SLO model since they are not billable. Cost will have to be offset through fund raising or donations, the model for Hospice SLO

#### C) Project Outcomes and Evaluation

1. Certification of 30-45 Vigil Doulas & 2-4 Lead Vigil Doulas trained using the INELDA standards and protocols.

2. Survey of local hospitalists, internists, home practice physicians, Internists and oncologists will demonstrate at least 20% increase in awareness of Vigil Doula services offered by Hospice SLO when they are appropriate and how to refer to them or access them.

3. Numbers of individuals served by Doula and Grief Companion programs and survey satisfaction.

D) The grant funds will be used to offset the cost of the trainings and materials, and associated travel expenses for the trainer for Doula program. Funds will also be used to create written materials to use in educating about the services and to provide to agencies, hospitals and the medical community. Grant will support Grief Companion training materials, training and supervision.

### **III. Project Future**

A) Hospice SLO will continue fund raising efforts to support the continuance of the Vigil Doula and Grief Companion program through direct ask, receipt of donations, designated gifts, fund raising events and grants. This is how we fund our agency routinely.

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

A) The board of directors provides oversight for the mission and direction of the organization. They meet monthly and decisions related to contracts, fiscal oversight, strategic direction, major event involvement. A Concours Steering Committee and Financial Committee currently report to the board and provide advisement. The board votes on action by majority vote. They are kept apprised of the monthly P&L to budget and Balance sheet and organization operations.

B) Kris Kington-Barker – ED, 35 years healthcare including rural health hospital and clinic administration, marketing and development. Tony Huffaker, LMFT- Director, Counseling Services 20+ years counseling and certified clinical supervision. Tracy Sturgell, Director Volunteer Services – Educated as a certified teacher for high school and adults; 5 years volunteer training, supervision and coordination experience..

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**V. Project Budget**

<b>Line Item Description</b>	<b>Line Item Explanation</b>	<b>Support From Your Agency</b>	<b>Support From Other Funders</b>	<b>Requested Amount From TCF</b>	<b>Line Item Total of Project</b>
INELDA cert for 40 Vigil Doula volunteers:22-hour classroom training; Participation in at least one shift with 3 different vigils; 18 hours of direct vigil experience; 6 doula/family dialog recordings; 6 evaluations—at least 4 from family members—and 2 from Cert. Vigil Doulas; Passing grade on the Vigil Doula Certification Exam	<b>\$4,500</b> flat rate	0	0	4500	4500
INELDA training for 4 Vigil Doula Leads; 22-hour classroom training led by an INELDA Certified Trainer; Participation in the planning and reprocessing sessions for at least 2 patient/family cases;18 hours direct lead doula experience; 6 doula/family dialog recordings; 6 evaluations—2 from patients, 2 from family, 2 from CLDs; Passing grade on the Lead Doula Certification Exam	\$200 x 4= \$800 2 days consulting after completion VD training @ \$150/hr = \$2400  Total: <b>\$3200</b>	0		3200	3200
Program Development Staff information session Community Info Meeting Physician Meetings Network meeting	12 hrs 3 hrs 4.5 hrs 4 hrs <u>2 hrs</u> 25.5 hrs x \$150/hr  <b>\$3825</b>	0		3825	3825

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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
SL Gimbel Foundation/	25,000
Gazin Foundation	16,097

### *Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date

**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	\$435744	41	Program Fees	\$0	0
Fundraising/Special Events	\$535479	50	Interest Income	\$23973	2
Corp/Foundation Grants	\$0		Other:	\$	
Government Grants	\$0		Other:	\$	

**Notes:**

Contributions includes Individual Donations, Organization donations, Tile of Life, Service Groups, bequests and trust donations

Travel, accommodations for Trainer from NY	Air Travel \$870 Hotel 5 nights x 211/night = \$1055 Meals x 6 days \$390 Car Rental \$227 <b>Total \$2542</b>	2542	0	0	2542
Update Grief Companion training program materials, training and policies and procedures  Provide 24 hr Training in 6 four hour sessions.  Print training manuals for all Grief Companion Volunteers  Supervise Grief Companion volunteers with 1 group mtg/mo x 3 hrs x \$26/hour	\$26/hr x 40 hours = \$1024  2 trainers @ \$26/hr x 24 = \$1248  \$30 x 20 = \$600  \$936 <b>Total: 3808</b>	0	0	3808	3808
Program promotion, information materials: Design Newsletter printing Postage Social Media Website update Brochures/collateral	\$3000 \$4,000 \$800 \$1400 \$700 \$2,000 <b>\$11,900</b>	2233	0	9797	11,900
Staff Supervision, monitoring and coordination for Doula Certification training and program and functions of Lead Doulas	10 hours/week x 23/hour x 52 weeks  <b>\$11,960</b>	11960	0	0	11960
<b>TOTALS:</b>	<b>41,735</b>	<b>\$16,735</b>	<b>0</b>	<b>\$25,000</b>	<b>\$41,735</b>

## 2015 S.L. Gimbel Foundation APPLICATION

### VII. Financial Analysis

Agency Name: Hospice of San Luis Obispo County

Most Current Fiscal Year (Dates): From July 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
\$523,834	\$437,394	\$60,935	\$25,505

**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
523,834	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	83%	11.63%	4.87%

**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 <u>Current</u> Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
%11.25	11.63 %	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.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$1,013,231	\$0	16,904	0.01

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**Excess or Deficit for the Year:**

<b>Excess or (Deficit)</b>	<b>Excess or (Deficit)</b>
<b>Most recent fiscal year end</b>	<b>Prior fiscal year end</b>
\$62,324	\$181,072

**Notes:**

Budgeting for our organization is always a challenge because our income is solely based on our ability to fund raise and receive donations. We do not have billing for services to fall back on. Our organization has successfully navigated these waters since 1977 with support from our community and Foundations since 1977.

HOSPICE OF SAN LUIS OBISPO COUNTY  
BOARD OF DIRECTORS  
July 2015

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**Kris Kington-Barker, Executive Director** - Kris joined Hospice of San Luis Obispo County in January 2010 when former ED Donna Kean retired after 14 years with the organization. Kris's background and experience focused in healthcare from 1972 – 2008 where her work ranged from youth counselor to health education and grant writing. In 1985 she ventured into healthcare marketing, physician recruitment and business development and in since 1999 she has worked in rural health and acute care clinical operations and administration in both the for profit, nonprofit sectors. Kris serves as a Health Commissioner for the San Luis Obispo County Health Commission and hosts Central Coast Voices, a weekly talk show on KCBX sponsored by the SLO Community Foundation.

**Anthony J. Huffaker, LMFT, Director of Counseling** – Prior to joining Hospice SLO in 2010, Tony was the Program Director for Casa Pacifica in Santa Barbara County from 2007 – 2010 and previously served as Assistant Director for Youth and Family Services in Santa Maria from 2000 - 2007. Tony has extensive background in family systems and working with youth. He also worked with the Central Coast Neurobehavioral Center in San Luis Obispo with adolescent and adult head trauma survivors. Tony's experience in supervising Master's prepared psychology students and MFT Interns have served to grow the pool of intern volunteers at Hospice SLO. The students and interns often stay with our organization for year offering stability in our counseling team and services.

**Tracy Stugell, Director of Volunteers** – Prior to joining Hospice SLO, Tracy was and educator with experience teaching students K-6 in classroom setting and later educating older students and adults in computer technology. After retiring from teaching she began volunteering with nonprofits including Family Care Network, ALS Association and the AIDS Support Network. Her background in teaching coupled with learned skills in organization and planning have translated extremely well in her ability to recruit, train and retain volunteers. Tracy initially started as the Office Manager for Hospice SLO and in 2014 was promoted to the position of Volunteer Director.

**Gracie Rey, Events and Development Director** – Gracie first joined Hospice SLO in 1995. Between 1995- 2004 she held a various roles in the organization including Volunteer Coordinator, Educator and Development Coordinator until 2008 when she left to join the Paso Robles Wine Alliance as their Promotions Manager. From 2004 – 2011 Gracie helped the Wine Alliance established the Paso Robles Wine Festival as an annual event attended by thousands and participated in by hundred of wineries each spring. In August 2013 she returned to Hospice SLO as the Events and Development Director where she is responsible for three major funding events the organization relies on each year for its operations.

**HOSPICE OF SLO COUNTY**  
**Budget Overview**  
**2015-16 vs 2014-15**

	<b>14-15 Actual *</b>	<b>Jul '15 - Jun 16</b>
<b>Ordinary Income/Expense</b>		
<b>Income</b>		
Beerfest	332,139.00	300,000.00
Bequests, Trust, Endowment	372,677.00	180,000.00
Bingo Bonanza	0.00	
Brickyard Theatre	0.00	
Concours Income	125,718.00	122,000.00
Employee Donations	0.00	2,000.00
Endowment Fund Transfer	40,000.00	8,000.00
Eroica CA Event Income	49,501.00	30,000.00
Grants	0.00	130,000.00
In Kind Donations	0.00	10,000.00
<b>Individual Donations</b>		
Counseling Services Income		2,000.00
Memorials		7,000.00
Individual Donations	39,779.00	27,000.00
<b>Total Individual Donations</b>	39,779.00	36,000.00
Interest Income	23,973.00	20,000.00
Light up a Life	37,680.00	35,000.00
<b>North County Income</b>		
North County-Donations	250.00	500.00
North County Income - Fundraiser	0.00	7,000.00
<b>Total North County Income</b>	250.00	7,500.00
Organization/Service Group Inc	11,471.00	15,000.00
Other Fundraisers/Income	4,148.00	1,000.00
Pet Program	7,333.00	6,000.00
SLO Coalition POLST Income	1,145.00	3,500.00
Tile of Life	2,000.00	3,000.00
Training/Workshops	2,460.00	1,500.00
United Way/NHN	2,234.00	4,000.00
Wilshire Healthcare Contract	0.00	0.00
<b>Total Income</b>	<b>1,052,508.00</b>	<b>914,500.00</b>
<b>Gross Profit</b>	<b>1,052,508.00</b>	<b>914,500.00</b>
<b>Expense</b>		
Advert/Publicity/Public Relat	29,950.00	30,000.00
Audit/Legal	8,265.00	6,500.00
Beer Festival Expense	104,318.00	115,000.00
Bookkeeping/Payroll	9,480.00	9,500.00
Cell Phone	1,800.00	3,000.00
Cleaning Service	2,575.00	3,000.00
Community Outreach	9,498.00	10,000.00
Concours Expense	100,603.00	102,000.00
Contract Services	11,185.00	14,000.00
<b>Counseling Services</b>		
Counsel Svc-Equipment/Materials	0.00	1,150.00
Counsel Svc-Training	0.00	1,400.00
Counseling Services - Other	604.00	795.00
<b>Total Counseling Services</b>	604.00	3,345.00
Dues/Memberships	2,528.00	2,000.00
Eroica CA Event	34,814.00	7,000.00
Insurance	18,681.00	19,000.00
Lawn Serv/Pest Control	2,200.00	3,500.00

**HOSPICE OF SLO COUNTY**  
**Budget Overview**  
**2015-16 vs 2014-15**

	<b>14-15 Actual *</b>	<b>Jul '15 - Jun 16</b>
Licenses/Taxes/Fees	1,717.00	1,500.00
Light up a Life Expense	15,377.00	14,000.00
Mileage Reimbursement	3,768.00	3,800.00
North County Expense		
No Cnty-Fundraiser	0.00	2,000.00
North County Expense - Other	1,000.00	2,000.00
<b>Total North County Expense</b>	<b>1,000.00</b>	<b>4,000.00</b>
Office Supplies	16,561.00	13,000.00
Other Fundraisers	500.00	0.00
Payroll Taxes	30,300.00	30,000.00
Personnel/Employee Benefits		
Employee Benefits/WC	25,269.00	28,750.00
Salaries		
Payroll Expense-No County Wages		
Salaries - Other	368,945.00	365,467.00
<b>Total Salaries</b>	<b>394,214.00</b>	<b>394,217.00</b>
<b>Total Personnel/Employee Benefits</b>	<b>394,214.00</b>	<b>394,217.00</b>
Pet Program Expense	3,220.00	3,500.00
Postage	787.00	2,500.00
Printing	2,557.00	10,000.00
Repairs/Maintenance	40,000.00	8,000.00
SLO Coalition POLST	2,000.00	3,500.00
Telephone	0.00	0.00
Tile of Life Expense	37.50	200.00
Training/Education	4,872.00	1,500.00
Utilities	9,021.00	9,000.00
Volunteer Services		
Vol Svc-Advertising	0.00	2,000.00
Vol Svc-Equipment	0.00	0.00
Vol Svc-Volunteer Meetings	0.00	1,000.00
Vol Svc-Livescan/TB	0.00	1,250.00
Vol Svc-Training/In Service	0.00	2,664.00
Volunteer Services - Other	2,500.00	10,700.00
<b>Total Volunteer Services</b>	<b>2,500.00</b>	<b>17,614.00</b>
Xerox Contract/Service	6,503.00	8,000.00
<b>Total Expense</b>	<b>871,435.50</b>	<b>852,176.00</b>
<b>Net Ordinary Income</b>	<b>181,072.50</b>	<b>62,324.00</b>
<b>Net Income</b>	<b>181,072.50</b>	<b>62,324.00</b>

\* 2014-15 Actual numbers are through June 20th, 2015

In-kind donation have not yet been added in for current year

**Note: Expenses for Volunteer and Counseling Services are budgeted with more delineation in 2015-16 budget for easier tracking**




**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	54,752.	46,539.	5,475.	2,738.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0.	0.	0.	0.
7 Other salaries and wages	260,498.	221,423.	26,050.	13,025.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	27,783.	23,616.	2,778.	1,389.
10 Payroll taxes	22,952.	19,509.	2,295.	1,148.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	4,619.		4,619.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)				
12 Advertising and promotion	22,330.	20,097.	2,233.	
13 Office expenses	9,789.	8,810.	979.	
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel	1,711.	1,454.	171.	86.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	30,517.	27,465.	3,052.	
23 Insurance	12,880.	7,599.	1,546.	3,735.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>CONTRACT SERVICES</u>	22,199.	18,203.	1,998.	1,998.
b <u>BOOKKEEPING</u>	8,850.	7,256.	797.	797.
c <u>REPAIRS AND MAINT.</u>	8,582.	7,724.	858.	
d <u>UTILITIES</u>	8,505.	7,654.	851.	
e All other expenses	27,867.	20,045.	7,233.	589.
25 Total functional expenses. Add lines 1 through 24e.	523,834.	437,394.	60,935.	25,505.
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).				

 The Community Foundation <small>Serving Riverside and San Bernardino Counties</small>	<b>S.L. Gimbel Foundation Fund</b> <b>Grant Evaluation Form</b>
<b>Grant Period:</b>	<b>2014</b>

Organization: Hospice of San Luis Obispo County

Contact Name: Kris Kington-Barker

Title: Executive Director

Phone Number: 808-544-2266

Grant Period: January – December 2014

Award Amount: \$25,000

Grant Number: 20130962

- Describe the project’s key outcomes and results based on your goals and objectives. Provide the number of clients served and other relevant statistics.

We contracted with a local public relations agency to assist us in developing a plan to increase public awareness of Hospice of SLO County services, how and when to access. Based on the recommendations of the agency we collaboratively developed a community survey to assess a baseline of the general and medical community understanding of a “volunteer” hospice and its services. The survey was administered via social media, email and direct mail to a broad base of the professional and general community. We received a 9% response rate. The results of the survey were used to create a Messaging and Planning Strategy to address areas of identified confusion and to create improved messaging to focus on clarifying Hospice of SLO services, how and when to access them and the unique benefits of a volunteer hospice in the community. From the survey results the agency assisted us in developing a more current and clear logo and messaging campaign. The design a PR and marketing effort consistent with our daily and ongoing efforts to educate and assist the community and health care providers about our services and how to access them. The campaign was designed with a nonprofit agencies ongoing resources to maintain it kept at the forefront.

- What were the challenges and obstacles you encountered (if any) in attaining your goals & objectives? How did you overcome and/or address the challenges and obstacles? What were the lessons learned? The largest challenge for our agency is always finding the time to dedicate to efforts outside of direct service and fund raising. This was overcome with a strong desire by all staff, Board Members and volunteers to more effectively promote the services of the organization for continued community awareness and fund raising.

We were challenged to meet our timeline to complete the project within the period of the grant. We have continued this process into 2015 and completed our updated logo design which we wanted to do before printing new materials.

- Describe any unintended positive outcomes as a result of the efforts supported by this grant.

The survey implemented prior to developing the materials was extremely useful. It validated anecdotal understanding about the confusion of services provided by a *volunteer* hospice and highlighted that the medical community is often unaware of the resource we serve. The feedback has helped us develop a communication strategy we are using on social media campaigns and efforts.

- Describe the overall effect this grant has had on your organization.  
Our organization remains focused on filling in gaps of service in the community for those with a life limiting illness and their family/friends. Because we are unable to bill for any services, we often also have to focus on fundraising efforts. Between these two it was difficult to allocate resources and time for very important activities that were the focus of this grant and we would likely have been distracted from making these efforts without the grant from the SL Gimbel Foundation to fund and drive us.

- Tell us a few success stories that made an impact on your organization and/or community as a result of this grant.

We were able to identify what has been the foundation of our success in reaching out to the community. In the past our organizations' focus has drifted to appearing competitive with medical hospices and other nonprofits when in fact our strength and gift to the community and those we serve is to add an additional lay of support and function as a bridge between services.

The ad agency recommended strong focus on our use of social media through FaceBook and our website. We found their assistance in daily postings with general information, Hospice SLO specific and links to articles and other websites has gained a tremendous boost in our Facebook "likes" and participation. We will be continuing these activities with the agency and will be broadening them. They are cost effective and give great exposure for vital and helpful information.

- Provide a financial report on the use of your grant funds (expenditures)

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	Total cost of Project
Consulting for Social media, E-newsletters, press releases, PSAs, website updates	\$650/month x 10 = \$7800  <b>Actual: \$1500/mo \$18,000</b>	11,500	0	\$6500	\$18,000
Part Time Volunteer Coordinator Asst.	\$17/hour x 20 hrs/wk  <b>Hired Vol Coord @ 17.50/hour</b>	\$1200	0	\$17,000	\$18,200
Graphic design & printing Rack Cards, Physician office materials <b>Logo revision/messaging/design standard, social media have been completed. Printing not yet completed.</b>	Estimated  Design \$500 Printing \$1500  <b>Actual Cost: \$4367</b>	2867	0	\$1500	\$4367
<b>TOTALS:</b>		15567		25000	40567



# HASPICE SLO COUNTY

*A Volunteer Hospice*

Internal Revenue Service  
District Director

Department of the Treasury  
LA:EO:79 2416

Date: 08 NOV 1979

Our Letter Dated: July 27, 1978

Person to Contact: W. T. Mabry

Contact Telephone Number:  
(213) 682-4170

▷ Hospice of San Luis Obispo County  
1304 Pacific Street  
San Luis Obispo, CA 93401

Gentlemen:

This modifies our letter of the above date in which we stated that you would be treated as an organization which is not a private foundation until the expiration of your advance ruling period.

Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Internal Revenue Code, because you are an organization of the type described in section 170(b)(1)(A)(vi)\*. Your exempt status under section 501(c)(3) of the code is still in effect.

Grantors and contributors may rely on this determination until the Internal Revenue Service publishes notice to the contrary. However, a grantor or a contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 170(b)(1)(A)(vi)\* status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 170(b)(1)(A)(vi)\* organization.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



W. H. Connett  
District Director

\* and section 509(a)(1)

Cindrich & Company  
1368 Marsh Street  
San Luis Obispo, California 93401

This representation letter is provided in connection with your audit of the financial statements of Hospice of San Luis Obispo County, Inc., which comprise the statements of financial position as of June 30, 2014, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, for the purpose of expressing an opinion as to whether the financial statements present fairly, in all material respects, in accordance with U.S. generally accepted accounting principles (U.S. GAAP).

Certain representations in the letter are described as being limited to matters that are material. Items are considered material, regardless of size, if they involve an omission or misstatement of accounting information that, in light of surrounding circumstances, makes it probable that the judgment of a reasonable person relying on the information would be charged or influenced by the omission or misstatement. An omission or misstatement that is monetarily small in amount could be considered material as a result of qualitative factors.

We confirm, to the best of our knowledge and belief, as of January 7, 2015, the following representations made to you during your audit:

#### **Financial Statements**

1. We have fulfilled our responsibilities, as set out in the terms of the audit engagement letter dated June 24, 2014, including our responsibility for the preparation and fair presentation of the financial statements in accordance with U.S. GAAP.
2. The financial statements referred to above are fairly presented in conformity with U.S. GAAP.
3. We acknowledge our responsibility for the design, implementation and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.
4. We acknowledge our responsibility for the design and implementation of programs and controls to prevent and detect fraud.
5. Significant assumptions we used in making accounting estimates, including those measured at fair value, are reasonable.

6. Related party relationships and transactions have been appropriately accounted for and disclosed in accordance with U.S. GAAP.
7. All events subsequent to the date of the financial statements are for which U.S. GAAP requires adjustment or disclose have been adjusted or disclosed.
8. We are in agreement with adjusting journal entries you have proposed, and they have been posted to the Organization's accounts. In this case, no representation about uncorrected misstatements is necessary.
9. The effects of all known actual or possible litigation, claims and assessments have been accounted for and disclose din accordance with U.S. GAAP.
10. Material concentrations have been appropriately disclosed in accordance with U.S. GAAP.
11. Guarantees, whether written or oral, under which the Organization is contingently liable, have been properly recorded or disclosed in accordance with U.S. GAAP.

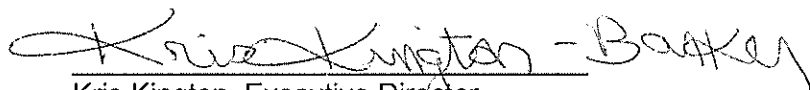
**Information Provided**

12. We have provided you with:
  - a. Access to all information, of which we are aware, that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation and other matters.
  - b. Additional information that you have requested from us for purposes of the audit.
  - c. Unrestricted access to persons within the Organization from whom you determined it necessary to obtain audit evidence.
  - d. Minutes of the meeting and governing board or summaries of actions of recent meetings for which minutes have not yet been prepared.
13. All material transactions have been recorded in the accounting records and are reflected in the financial statements.
14. We have disclosed to you the results of our assessment of the risk that the financial statements may be materially misstated as a result of fraud.

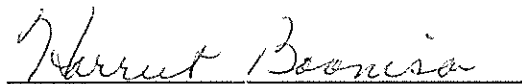
15. We have no knowledge of any fraud or suspected fraud that affects the Organization and involves:
  - a. Management
  - b. Employees who have significant roles in internal control, or
  - c. Others where the fraud could have a material effect on the financial statements.
16. We have no knowledge of any allegations of fraud or suspected fraud affecting the Organization's financial statements communications by employees, former employees, grantors, regulators, or others.
17. We have no knowledge of any instances of noncompliance or suspected noncompliance with laws and regulations whose effects should be considered when preparing financial statements.
18. We are not aware of any pending or threatened litigation, claims, or assessments or unasserted claims or assessments that are required to be accrued or disclosed in the financial statements in accordance with U.S. GAAP, and we have not consulted a lawyer concerning litigation, claims, or assessments.
19. We have disclosed to you the identity of the Organization's related parties and all the related party relationships and transactions of which we are aware.
20. The Organization has satisfactory title to all owned assets, and there are no liens or encumbrances on such assets nor has any asset been pledged as collateral.
21. We are in compliance with the laws, regulations and provisions of contracts and grant agreements applicable to us.
22. Hospice of San Luis Obispo County, Inc. is an exempt organization under Section 501(c)(3) of the Internal Revenue Code. Any activities of which we are aware that would jeopardize the Organization's tax-exempt status, and all activities subject to tax on unrelated business income or excise or other tax, have been disclosed to you. All required filings with tax authorities are up-to-date.
23. Receivables recorded in the financial statements represent valid claims against debtors for sale or other charges arising on or before the balance sheet date and have been reduced to the estimated net realizable value.

24. In regards to Federal and State information returns prepared by you, we have:
- a. Assumed all management responsibilities.
  - b. Designated an individual with suitable skill, knowledge, or experience to oversee the services.
  - c. Evaluated the adequacy and results of the services performed.
  - d. Accepted responsibility for the results of the services.

Sincerely,



Kris Kington, Executive Director  
January 7, 2015



Harriet Boonisar, Bookkeeper  
January 7, 2015



Strengthening Inland Southern California through Philanthropy

*S. L. Gimbel Foundation Fund*

August 26, 2015

BOARD OF DIRECTORS

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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. Kris Kington-Barker  
Executive Director  
Hospice of San Luis Obispo County  
1304 Pacific Street  
San Luis Obispo, CA 93401

Dear Ms. Kington-Barker:

Congratulations! A grant has been approved for **Hospice of San Luis Obispo County** in the amount of **\$25,000** 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:

*Hospice services: To provide support services for individuals with limited financial resources who are coping with life limiting and/or terminal illness with respite care, end of life vigil support, counseling, emotional support and education.*

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](mailto:ccudiamat@thecommunityfoundation.net).

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

19018 Hospice of San Luis Obispo County

20150637

GIMB4



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



## 2015 S.L. Gimbel Foundation Fund

### Grant Agreement

**Organization:** Hospice of San Luis Obispo County

**Grant Amount:** \$ 25,000 **Grant Number:** 20150637

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

**Purpose:** Hospice services: To provide support services for individuals with limited financial resources who are coping with life limiting and/or terminal illness with respite care, end of life vigil support, counseling, emotional support and education.

#### 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.**

Kris Kingston-Barker  
Signature

9-2-2015  
Date

Kris Kingston-Barker  
Printed Name

Executive Director  
Title

Organization: 19018 Hospice of San Luis Obispo County  
Grant Number: 20150637

*SK*  
9/29/15

# The Community Foundation

Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS September 29, 2015

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Chair of the Board

Sean Varner  
Vice Chair of the Board

Pat Spafford, CPA  
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Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Teresa Rhyne

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Ms. Lynn Werner  
Executive Director  
Housatonic Valley Association  
P.O. Box 28  
Cornwall Bridge, CT 06754

Dear Ms. Werner:

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 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

20150638

39682

GIMB4

Dr. Jonathan Lorenzo Yorba  
President and CEO



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](http://www.thecommunityfoundation.net)

# The Community Foundation

Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS      September 29, 2015

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Chair of the Board

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Teresa Rhyne

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms. Kris Kington-Barker  
Executive Director  
Hospice of San Luis Obispo County  
1304 Pacific Street  
San Luis Obispo, CA 93401

Dear Ms. Kington-Barker:

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

Sincerely,

  
Celia Cudiamat

Executive Vice President of Programs

20150637

39681

GIMB4



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U.S. Community Foundations

3700 Sixth Street, Suite 200 ~ Riverside, California 92501  
P: 951.241.7777 ~ F: 951.684.1911 ~ [www.thecommunityfoundation.net](http://www.thecommunityfoundation.net)

**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

Check Fraud Protection for Business

39681

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

TO THE ORDER OF

DATE

AMOUNT

08/27/2015

\$ \*\*\*\*25,000.00

Hospice of San Luis Obispo County  
 1304 Pacific Street  
 San Luis Obispo, CA 93401



*Jonathan Lorenz Jones*  
*Chris Chidambatt*  
 AUTHORIZED SIGNATURE

Security features. Details on back.

⑈039681⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation			<b>39681</b>
19018	Hospice of San Luis Obispo County	08/27/2015	039681
20150637	08/25/2015 Hospice services		25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund	25,000.00	

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

The Community Foundation			<b>39681</b>
19018	Hospice of San Luis Obispo County	08/27/2015	039681
20150637	08/25/2015 Hospice services		25,000.00
GIMB	S.L. Gimbel Foundation Advised Fund	25,000.00	

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