

GRANTEE I.D. 151  
\$25,000  
1/24/18

**Organization / Agency Information**

<b>Organization/Agency Name:</b> Idyllwild Help Center		
<b>Physical Address:</b> 26330 Hwy 243, Idyllwild, CA 92549-0660		
<b>Mailing Address:</b> P.O. Box 660, Idyllwild, CA 92549		
<b>CEO or Director:</b> Ms. Colleen Meyer		<b>Title:</b> Executive Director
<b>Phone:</b> (951) 659-2110	<b>Fax:</b> (951) 659-6243	<b>Email:</b> ed@idyllwildhelpcenter.org
<b>Contact Person:</b> Colleen Meyer		<b>Title:</b> Executive Director
<b>Phone:</b> (951) 659-2110	<b>Fax:</b> (951) 659-6243	<b>Email:</b> ed@idyllwildhelpcenter.org
<b>Web Site Address:</b> http://www.idyllwildhelpcenter.org		<b>Tax ID:</b> 33-0496201

**Program / Grant Information**

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

<b>Program/Project Name:</b> Health Care Access and Travel Assistance for Low-Income Seniors			<b>Amount of Grant Requested:</b> \$25,000
<b>Total Organization Budget:</b> \$320,525	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> 80%	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C / Column A x 100):</b> 6.8%	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b> 19.9%
<b>Purpose of Grant Request (one sentence):</b> To financially assist disadvantaged seniors age 55+ with vouchers to access health care for and transportation to medical, dental, and vision care appointments.			
<b>Program Start Date (Month and Year):</b> 1/1/2018		<b>Program End Date (Month and Year):</b> 12/31/2018	
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b>			

## 2017 S.L. Gimbel Foundation Fund APPLICATION

### Narrative

#### **I. Organization Background**

Twenty-five years ago the Idyllwild Help Center was founded, on the belief that every life matters... that none of our neighbors in our rural, mountain communities should go cold or hungry... no one should have to choose between vitally needed medications or food... The IHC's mission is simply helping our disadvantaged neighbors in need. Since 1992, IHC has provided urgently needed programs and services to qualified low-/no-income individuals and families through the food pantry, medical assistance, utility assistance, split firewood, the children's fund, and women's cabinet. IHC is the only organization providing basic safety net services to our mountain communities. However, we have created collaborative relationships with other organizations providing services to this population, so that we can provide a continuum of care; IHC is a designated Coordinated Entry System (CES) provider, which ensures 'no wrong door' for homeless people accessing the services they so urgently need. We collaborate with the County's Alternative Sentencing and Sheriff's Labor Programs, and other County homeless assistance programs to ensure that clients have all opportunities for rehabilitation. Ultimately, we give our clients not only a hand out, but also a 'hand up' so they may achieve self-sufficiency, and a better, brighter, healthier future.

#### **Organizational Accomplishments:**

IHC has professionalized and solidified our organizational infrastructure, and for 3+ years, we've had a strong Executive Director and Board President, a committed, passionate board of local residents (with experience in nonprofits, business, finance, marketing and/or human services), establishment of board working committees, fundraising training, expanding volunteer force, and more. We are maximizing our service delivery and impact on clients' lives. Annually for the past 3 years, approximately 87 people received \$100/year propane assistance during winter months -- including 47 seniors; 506 medical services were provided to vulnerable adults and children. They received critically needed, sometimes life-saving care: doctor visits and surgery; the gift of sight of eye glasses, eye exams; essential dental work; vitally needed, often high-cost prescriptions; expensive hospital bills; critical physical therapy. 93 school children from low-income families received new clothes, shoes, and back-to-school supplies, thanks to our Children's Fund. 1,031 times we gave free firewood to disadvantaged neighbors, so they can heat their homes, instead of freezing during our cold winter nights. We gave 2,020 bags of nutritious food/personal hygiene products to deserving clients; 50 families received nourishing meals at both Thanksgiving and Christmas; without our help they wouldn't have had holiday dinner. Hundreds of economically challenged individuals received warm clothes, socks, shoes/boots, and outerwear so they can stay warm through chilly winters. We helped 27 homeless people with food, clothing, and medical care, plus "warm referral" to shelter and other services/resources outside our scope. Over the past 10 years, our annual Community Health Fairs have provided vitally needed services -- including flu shots -- with far-reaching impact to nearly 2,500 who may not have otherwise received care. IHC staff is CERT trained, and IHC serves as command center for Riverside County Department of Public Health and Office of Emergency Services in event of "shelter-in-place" emergencies.

#### **Program Activities:**

The IHC is the only agency providing basic safety net services to approximately 15% of our 3,874 permanent residents of the remote Riverside County/San Jacinto Mountains rural communities of Idyllwild, Pine Cove, and Mountain Center -- all ages, all ethnicities. Our clients are the working poor, low-income individuals and families, fixed income seniors, Veterans, the disabled, and the medically fragile. Clients must qualify for services; they must be at/below the Federal Poverty Level. Of the disadvantaged people we help, 67% are seniors and the disabled, 45% are families whose children qualify for the free school lunch program -- an additional 15% qualify for reduced school lunch; 27 are homeless. Our programs are: Emergency Food Pantry (non-perishable food) & Food Voucher Program (perishable food); Health Care Assistance & Travel Access Vouchers; Utility Assistance Program; Wood Distribution Program; Children's Back-to-School Fund (supplies, extracurricular sports/school activities); Clothing & Shoes for school, work, and daily life, via the Thrift Store, for highest need clients; and annual Community Health Fairs. Additionally, we have been creating a client culture of "giving back," by requiring clients to volunteer their time and skills with our Thrift Store and programs. Our clients, who have very little, often reach out to help each other in times of need. Additionally, we collaborate with the County's

Alternative Sentencing and Sheriff's Labor Programs, and other County sponsored homeless assistance programs to ensure that our clients have all opportunities for rehabilitation.

We will invite current IHC eligible low-income seniors residing in Idyllwild, Pine Cove, and Mountain Center to apply for the program, and inform them of the new financial caps. Our methodology will be 1) to work with clients via case management to make them aware of a) the vital importance of healthcare to their overall health and wellness, and b) health services access vouchers are available to them; and 2) to promote health importance, prevention measures, and access to health services at our Annual Health Fair.

We will announce through our local newspaper that funding for seniors is now available and increased (thanks to the S.L. Gimbel Foundation, if you wish to be mentioned). As incurred, we will reimburse approximately 75 senior citizen clients up to \$250 in eligible healthcare expenses (for vision, dental, and medical), and reimburse them for up to \$75 in eligible transportation expenses incurred in traveling to vision, dental, and/or medical appointments. Our Client Services Administrator will track this data for the final grant report.

## **II. Project Information:**

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

Idyllwild HELP Center respectfully requests a grant of \$25,000 to support our "Health Care Access and Travel Assistance for Low-Income Seniors" program. Of the disadvantaged, often "invisible" people we help in our rural community, 60% are seniors and disabled persons. In the last several years, we have seen an increase in senior/disabled persons applying for our program to help cover health care and prescription medication costs resulting from the Medicare "doughnut hole," and for transportation vouchers to get to medical appointments.

Seniors tell us that they often must choose between vitally needed health care or food... or between expensive prescriptions or paying utilities so that they can stay warm during our bitter cold mountain winters. Indeed, too often we hear stories from our senior and disabled clients who struggle over meeting their basic needs and so often they choose to forgo needed medical check-ups, preventative care, and/or renewing medications. Research shows that preventative care, including regular dental checkups, is essential to good senior health. However, in a financial crunch, these are often the first to be cancelled due to lack of funding. While we understand how these short-term decisions are made out of financial necessity, the longer-term implications can be medically disastrous and financially devastating.

While many of the Seniors we serve are either afforded medical insurance through the Affordable Care Act or through Medicare, the costs of co-pays and transportation have continued to be a significant barrier to healthcare access. Being geographically remote makes accessing medical care especially challenging for most of our clients due to a lack of insurance or the cost of travel to a practitioner. Thus, our clients often must travel a minimum of 25 miles through winding mountain roads to seek medical, vision, and dental care, pharmaceuticals, laboratory testing, MRIs/Xrays, and more. Attaining advanced services and or access to a Riverside County clinic requires extensive, expensive travel. Without friends or family to drive them, they often make the decision to stay home and forgo critically needed health care appointments.

Currently we cannot assist all the seniors with the extent of help they need. Currently, each recipient has been able to apply for up to \$100 in healthcare support annually, and can receive an additional \$25 transportation voucher, based upon availability and on a first come-first served basis. As you can imagine, \$100 is quickly exhausted -- and transportation costs to specialists becomes too burdensome to afford.

The program is in dire need of expansion to help more clients, and to help those clients with larger vouchers to help cover more of their medical expense and travel assistance.

### **B) Project Description**

#### **Purpose of Grant Request**

To financially assist disadvantaged seniors age 55+ with vouchers to access health care for and transportation to medical, dental, and vision care appointments.

In our rural Riverside County mountain communities, the need for health care access and travel voucher assistance for medical appointments is urgent. In 2014, The S.L. Gimbel Foundation helped us to firmly establish IHC's "Rural Health Care Access & Travel Assistance Vouchers for Low-Income Seniors" Program. We leveraged your support to attract other funders, and today it is an ongoing program. Thank you!

Through this vitally needed program, low-/no-income seniors (age 55+) receive essential and sometimes life-saving care: doctor visits and surgery; the gift of sight of eye glasses and eye exams; essential dental work; needed but often high-cost prescriptions; expensive hospitalizations; over-the-counter treatments, and critical physical therapy. As such, they have peace of mind to heal. Without our help, many low- or no-income seniors would make the difficult decision between whether they can afford rent/utilities OR medical care.

When a client comes to IHC for health/medical assistance, it opens the door for us to share other ways we can help them, such as weekly bags of food, firewood for heating, a food voucher to get healthy perishable food from our local grocery store, and a voucher to get clothes from our Thrift Store for our cold winters.

Thrift Store income covers Administrative expenses, to enable 100% of the proposed grant to go directly to this program. Every year, we raise funds dedicated to this medical access program. We spend only the dollars we can raise, and your contribution will be put to immediate good use.

Meet just a few senior clients whose lives have been helped dramatically...

- Ellen (not her real name) is an elderly single woman with significantly limited vision. With our assistance, she saw an optometrist and obtained eyeglasses that have helped her regain her eyesight... and improved her quality of life.
  - Joan required emergency back surgery. With our help, she and her husband didn't have to decide between buying food and heating their home, OR paying medical bills. She had the peace of mind to heal, without going hungry or freezing during our cold winters.
  - We helped a grandmother raising 3 grandchildren, including one who's medically fragile, with gas vouchers to get to her doctor appointments to receive Lupus treatments.
  - We assisted an elderly homeless man who's been hiking the Pacific Crest Trail after he lost his job and house 4 years ago, with a voucher to the pharmacy to purchase over-the-counter items to help with a significant injury to his foot that impacted his ability to walk to the grocery store to use his food stamp card.
  - We helped a client with the cost of urgently needed dental work: he had a serious infection in his mouth, which was creating a much larger issue for him, and greatly impacted his quality of life. Because of our assistance he was able to have the tooth removed and infection treated.
- We have many stories like these, of vulnerable seniors who now have healthier futures. No other organization is providing this service.

### C) Project Goal, Objectives, Activities & Expected Outcomes

Goal: Help vulnerable, low-income seniors (age 55+) residing in Riverside County's San Jacinto Mountain communities of Idyllwild, Pine Cove, and Mountain Center, to achieve better health by removing financial barriers to accessing medical, vision, and dental health care, and prevention services. Objective: Expand the IHC's highly successful "Rural Health Care Access & Travel Assistance Vouchers for Low-Income Seniors" program by increasing the annual one-time financial amounts of health care voucher support per client (from \$100/client/year to \$250/client/year), as well as increasing the financial amount of transportation assistance per client (from \$25/client/year to \$75/client/year). We anticipate helping approximately 75 clients.

#### Project Activities

We will invite current IHC eligible low-income seniors residing in Idyllwild, Pine Cove, and Mountain Center to apply for the program, and inform them of the new financial caps. Our methodology will be 1) to work with clients via case management to make them aware of a) the vital importance of healthcare to their overall health and wellness, and b) health services access vouchers are available to them; and 2) to promote health importance, prevention measures, and access to health services at our Annual Health Fair.

We will announce through our local newspaper that funding for seniors is now available and increased (thanks to the S.L. Gimbel Foundation, if you wish to be mentioned). As incurred, we will reimburse approximately 75 senior citizen clients up to \$250 in eligible healthcare expenses (for vision, dental, and medical), and reimburse them for up to \$75 in eligible transportation expenses incurred in traveling to vision, dental, and/or medical appointments. Our Client Services Administrator will track this data for the final grant report.

### Expected Outcomes

Approximately 75 unduplicated low-income senior citizens will receive vouchers and ultimately will have improved health as a result of access (both financial and transportation) to critically needed medical, dental, and vision care.

### Evaluation

Our Client Services Administrator will track on an ongoing basis, the number of clients (75) served by this grant, and the health access and transportation voucher expenditures. She will also collect qualitative information, such as interviewing clients to obtain their stories regarding the impact of how their health and well being has improved through this grant.

Because this is an existing program, we have systems in place that enable us to easily keep track of all funding and the progression of the clients in our program. We have been able to streamline the program protocols from client entry all the way through their utilization of the vouchers. We track each client's progress through the program in contact and referral logs to ensure that clients are able to maximize the information provided to them. Because of our personal and in-depth involvement with our clients, we can assess their progress as they seek and utilize healthcare through the voucher program.

#### D) Timeline

Provide a timeline for implementing the project. State the start date and ending date of the project, include timeframes for specific activities, as appropriate.

Announcements about the availability of funding would begin as soon as we are notified of the grant award. Funds would begin to be distributed to eligible seniors on a first come-first served basis. It is estimated that the funds would be distributed within six months. At the end of the grant period, we will compile a report of how the funds were distributed, with financial breakdown.

#### E) Target Population

Who will this grant serve? How many people will be impacted? Provide a breakdown:  
Number of Children, Youth, Adults, Seniors, Animals.  
Economically Challenged

#### F) Projects in the Community

How does this project relate to other existing projects in the community? Who else in the community is providing this service or has a similar project? Who are your community partners (if any)? How are you utilizing volunteers?

There are no other existing similar projects in our community/catchment area. The Idyllwild HELP Center is the only structured safety-net organization in the Idyllwild Mountain community area, providing healthcare support for disadvantaged clients. We partner with/refer to our local pharmacy, and 2 community health clinics, as well as collaborate with and make referrals to many Riverside County agencies. However, no other resource provides similar healthcare support resources to this vulnerable population of senior citizens. We have approximately 30 volunteers, utilized mainly within our Thrift Store and for food drives.

#### G) Use of Grant Funds

How will you use the grant funds?

### IV. Project Future

#### A) Sustainability

Health Care Access and Travel Assistance for Low-Income Seniors is a high fund raising priority. Twice a year, beginning Spring 2016, we've been seeking community support through Special Appeals for funds to all Idyllwild Post Box holders. The two mailings net \$20,000 annually. We continue to aggressively

seek new foundation, corporate, and government funds to support our work. Board members are working increase major donor support, and planned giving. In January 2016, the Board established a first-ever Fund Raising Committee, which organizes special events. The 2016 benefit play directed by actor/director Conor O'Farrell, and starring several well-known Idyllwild couples, in "Lovers & Other Strangers," raised \$15,000 net. A 2017 Fashion Show, in collaboration with Idyllwild Arts, raised \$6,200. Our Thrift Store generates income to cover administrative costs; currently we are taking Merchandising to the next level (including the upscale "The Shed" Boutique, launched March 2016), in order to generate additional net revenue to fund our programs. We are confident that we will ensure the Health Care Assistance Program for years to come. On behalf of our board and staff, and all the people we serve, we thank you for your very generous past support, and consideration of this important request.

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

##### **A) Governance**

IHC's Board is comprised of 4 residents who are passionate, hard-working ambassadors in our community -- with experience in business/finance, marketing/community relations, nonprofits, and/or healthcare/human services. Two years ago, IHC solidified its infrastructure with a new Executive Director (promoted from within), new Board President, created Board working committees (Finance Committee, Fund Raising Committee, Grounds Committee, and an Advisory Council), and a first Comprehensive Development Plan. The board has engaged in a professional, thoughtful process for focusing on its vision for the IHC's future, through a first-ever Strategic Plan, and, to make that happen, an Implementation Plan. The Board of Directors and the Executive Director meet monthly to review and discuss agency services, needs, finances, decision-making, opportunities, strategic planning, and implementation planning. The Board and Executive Director are responsible for making significant agency decisions and the Board provides oversight to the Executive Director about the day-to-day operations.

In April 2015, Karen Patterson, Executive Director since 2007, unexpectedly retired. The Board hired from within, promoting Colleen Meyer (then Client Services Administrator working closely with Ms. Patterson since 2007) to Executive Director. Skye Zambrana was promoted from Thrift Store, to Client Services Administrator. Skye had been an IHC client since 2009; we had the opportunity to give her a "hand up" to a better life. Previous Board President Deanna Collins (for 9+ years), passed away in 2015; Callie Wight MA/RN, was elected as President. Colleen and Skye, combined with 30+ volunteers, conduct our many services. They have served as a team at IHC for 10+ years, and have established efficient service delivery, enhanced and upgraded client tracking/recordkeeping, resource directory, and revitalized financial/budget/management processes. Thrift Store activities have been expanded, thereby increasing the earning capacity, which covers administrative expenses. We're maximizing service delivery -- and impact on lives.

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B) Management

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

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### V. Project Budget and Narrative (Do not delete these instructions on your completed form).

A) **Budget Table:** Provide a detailed line-item budget for your entire project by completing the table below. Requested line items should be limited to Ten (10) line items. The less the better.

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

- 1) Line item requests for materials, supplies, equipment and others:
  - a. Identify and list the type of materials, supplies, equipment, etc.
  - b. **Specify the unit cost, number of units, and total cost**
  - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff compensation, benefits: **Do not use FTE percentages.**
  - a. Identify the position; for each position request, **specify the hourly rate and the number of hours** (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
  - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)
- 3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above:  
Provide rate of pay per hour and number of hours.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Healthcare Voucher	for medical visits, co-pay	\$10,000	\$15,000	\$15,000	\$40,000
Transportation voucher	Gas vouchers for travel	\$5,000	\$5,000	\$10,000	\$20,000
<b>TOTALS:</b>		\$15,000	\$20,000	\$25,000	\$60,000



B) **Narrative:** The budget narrative is the justification of "how" and/or "why" a line item helps to meet the project deliverables. Provide a description for each line item request as necessary. Explain how the line item relates to the project. If you are requesting funds to pay for staff, list the specific duties of each position. See attached SAMPLE Project Budget and Budget Narrative

Provide 75 unduplicated seniors (\$55+) with \$200.00 vouchers towards access to medical assistance (office visits to doctor, dentist, vision; lab tests; prescriptions; Xrays; MRIs; etc.).

Provide to seniors approximately 133.33 \$75.00 vouchers for medical transportation costs to medical appointments off the "hill" (ie, to non-Idyllwild locations in the Coachella Valley or elsewhere in Riverside County).

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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
Community Development Block Grant	\$10,000
Bank of America	\$5,000
Idyllwild Community Fund	\$5,000
Idyllwild Community Fund Youth Grant Makers	\$580
Emergency Food and Shelter Program	\$9,409

*Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Pechanga	\$15,000	
Stater Bros	\$15,000	
Big Lots	\$15,000	
Walmart	\$15,000	

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

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions	\$31000		Program Fees	\$	
Fundraising/Special Events	\$40000		Interest Income	\$	
Corp/Foundation Grants	\$40000		Other:	\$10000	
Government Grants	\$20000		Other:	\$	

**Notes:** Other: Income from Restricted Gift

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**VII. Financial Analysis**

Agency Name: Idyllwild Help Center

Most Current Fiscal Year (Dates): From 7/1/17 To: 6/30/18

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!**

2015 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
\$202,907	\$162,479	\$13,836	\$26,592

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

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	80.1%	6.8%	13.1%

**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
19.9 %	19.9 %	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>
\$47,308.62	\$0	16,146.13	2.93

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### **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>
\$368,732.16	-\$65,975.68

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**Notes: Re: the Excess for recent FY:** The total that is Board restricted bequest funding was \$350,000 and it was received in 2016-2017 FY July 16 - \$100,000 and \$250,000 May 2017. \$250,000 is currently invested with TCF.

IDYLLWILD HELP CENTER  
BUDGET WORKSHEET

	A	B	C	D	E	F	G	H	I
1									
2									
3					Actuals				Adopted
4					13/14	14/15	15/16	16/17	17/18 Budget
6	INCOME								
7		Interest			37.09	148.02	29.72	9.26	-
8		Income from Restricted Gift							10,000.00
9		Thrift Store			139,120.16				180,000.00
10		Cash				54,853.48	124,621.22	121,062.46	
11		Credit				15,465.17	38,365.86	49,255.43	
12		Ebay				65,022.22		456.98	
13		Other Revenues							
14		Donations			49,076.36	17,703.68	22,206.23	29,465.29	31,000.00
15		Grants			41,595.12	97,744.64	38,601.50	69,052.31	60,000.00
18		Fundraisers			11,907.28	12,593.75	29,952.50	24,921.00	40,000.00
19		TOTAL INCOME			241,736.01	263,530.96	253,777.03	294,222.73	321,000.00
20									
21	EXPENSES								
22		Salaries							
23		Help Center							
24		Regular Pay			77,420.00	76,563.75	78,370.00	75,224.00	79,580.00
25		Overtime					258.75	406.88	500.00
26		Vacation			408.00	1,800.00		1,612.00	1,300.00
27		Sick Time						860.68	200.00
28		Bonus			100.00				
29		Thrift Store							
30		Regular Pay			49,352.67	59,970.59	64,023.00	62,181.93	66,600.00
31		Overtime			81.00	285.00	204.75	171.00	200.00
32		Vacation			378.00			1,032.00	2,570.00
33		Sick Time						1,461.00	950.00
34		Bonus					556.66	1,499.36	6,000.00
35		Benefits							
36		Help Center							
37		Federal Unemployment			84.00	84.00	84.00	84.00	100.00
38		Medicare			1,129.96	1,136.13	1,140.14	1,137.90	1,200.00
39		Social Security			4,831.54	4,857.92	2,924.99	4,866.48	5,000.00
40		CA Unemployment			434.00	434.00	941.73	826.00	950.00
41		CA-Employment Training Tax			14.00				
42		Thrift Store							
43		Federal Unemployment			261.12	195.50	165.88	147.18	200.00
44		Medicare			722.29	873.86	939.35	958.14	1,000.00
45		Social Security			3,088.33	3,736.47	5,966.63	4,095.89	4,300.00
46		CA Unemployment			1,349.16	1,010.12	1,988.56	1,447.23	1,600.00
47		CA-Employment Training Tax			30.45	14.53		1.04	
48		Program Costs							
49		Fundraising			2,881.34	2,755.45	4,487.46	3,987.25	4,500.00
50		Grants expended			31,697.54	28,373.18	76,823.76	65,924.74	60,000.00
51		Advertising			153.87	125.47	144.93	179.10	200.00
52		Food for Pantry			2,391.18	88.15	115.23	152.52	150.00
53		Printing					164.16		
54		Insurance							
55		Property			1,606.90	1,611.38	1,913.24	2,731.75	2,900.00
56		Gen'l Liability			1,268.00	1,299.00	1,370.96	1,370.00	1,400.00
57		D & O			1,198.00	1,217.00	1,332.97	1,500.00	1,500.00
58		TS Workmans Comp			3,858.42	4,697.78	5,015.62	3,643.92	5,800.00
59		HC Workmans Comp			887.31	517.28	895.39	4,289.58	1,025.00
60		Maintenance							
61		Office Equipment			2,650.00	292.00	863.00	511.50	500.00

IDYLLWILD HELP CENTER  
BUDGET WORKSHEET

	A	B	C	D	E	F	G	H	I
1									
2									
3					Actuals				Adopted
4					13/14	14/15	15/16	16/17	17/18 Budget
62				TS Grounds	3,965.30	5,766.91	4,760.08	2,587.48	5,000.00
63				HC Grounds	6,266.62	1,017.20	881.58	1,355.45	1,000.00
64				TS Pest Control	62.50		262.50	87.50	100.00
65				HC Pest Control	62.50		87.50	87.50	100.00
66				Mileage Reimbursemnt	368.72	202.72	420.62	511.18	500.00
67				Memberships, Dues & Subcriptions	99.00	29.00	57.00	50.00	100.00
68				Professional & Specialized Services					
69				Bookkeeping	2,576.25	2,472.00	2,472.00	2,266.00	2,500.00
70				Accountant/Audit	3,050.00	4,850.00	3,400.00	250.00	10,500.00
71				Grant Writer	7,230.00	5,248.00	9,979.00	9,060.00	9,000.00
72				Legal		27.50			
73				Website hosting	140.00	200.00	210.00		250.00
74				Supplies					
75				HC Office Supplies	3,801.80	5,249.14	6,467.89	3,166.02	5,000.00
76				TS Supplies		7.99	279.55	663.55	1,000.00
77				Postage and Freight	280.19	319.74	1,483.68	282.00	300.00
78				Minor Equipment/Software					
79				Taxes					
80				Sales Tax	7,736.00	7,695.00	12,431.00	12,169.66	15,000.00
81				Property	2,133.60	2,133.54	2,442.06	2,220.64	2,500.00
82				Dept of Forrestry	464.66	234.66	234.66		250.00
83				Charitable Tax	2,472.00	2,728.00	65.85	10.00	100.00
84				Training - Staff					500.00
85				Utilities					
86				Electricity					
87				HC	956.93	674.85	974.81	1,500.56	1,500.00
88				TS	1,146.73	888.15	908.56	935.14	1,000.00
89				Water					
90				HC	613.44	920.06	790.34	803.40	900.00
91				TS	636.08	828.09	1,435.39	1,287.44	1,500.00
92				Propane					
93				HC	1,203.51	1,017.99	1,101.17	811.08	1,000.00
94				TS	1,201.23	1,018.06	626.63	811.08	1,000.00
95				Trash					
96				HC	853.44	994.15	1,428.67	1,703.49	950.00
97				TS	2,863.22	2,798.81	2,176.70	1,975.19	2,850.00
98				Telephone/internet/fax					
99				HC	2,359.47	1,971.26	2,184.59	2,231.19	2,200.00
100				TS	812.32	1,125.79	1,150.50	1,083.75	1,000.00
101				Capital Outlay					
102				Equipment > ??					
103				Other					
104				Late Charges					
105				Bank Charges					
106				Merchant Svc/PayPal Fees	3,104.01	1,800.52	576.28	2,067.59	2,200.00
107				Gen'l Svc Fees	145.00	554.20	768.04	417.00	500.00
108				EXPENSES TOTAL	244,881.60	244,711.89	310,747.81	292,696.96	320,525.00
109									
110				NET SURPLUS/(DEFICIT)	(3,145.59)	18,819.07	(56,970.78)	1,525.77	475.00

**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 domestic organizations and domestic governments. See Part IV, line 21.				
2 Grants and other assistance to domestic individuals. See Part IV, line 22.				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	57,281.	40,000.	8,641.	8,640.
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.				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
9 Other employee benefits.				
10 Payroll taxes.	14,053.	12,000.	1,027.	1,026.
11 Fees for services (non-employees):				
a Management.				
b Legal.				
c Accounting.	5,872.	4,698.	587.	587.
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	9,979.			9,979.
12 Advertising and promotion.	145.	120.		25.
13 Office expenses.	6,475.	5,180.	648.	647.
14 Information technology.	1,073.	858.	108.	107.
15 Royalties.				
16 Occupancy.	11,289.	9,031.	1,129.	1,129.
17 Travel.	421.	337.	42.	42.
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.	448.	358.	45.	45.
23 Insurance.	13,050.	10,440.	1,305.	1,305.
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 GRANT FUND DISTRIBUTIONS	76,824.	76,824.		
b FUNDRAISING OTHER	2,824.			2,824.
c Postage and Shipping	1,484.	1,187.	149.	148.
d BANK CHARGES/CREDITCARD FEES	1,344.	1,200.	72.	72.
e All other expenses.	345.	246.	83.	16.
25 Total functional expenses. Add lines 1 through 24e.	202,907.	162,479.	13,836.	26,592.
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).				

2:00 PM  
10/25/17  
Cash Basis

Idyllwild HELP Center  
Profit & Loss  
July 2016 through June 2017

	Jul '16 - Jun 17
Ordinary Income/Expense	
Income	
Dividends	729.97
Donations	
Food Pantry	1,189.84
Help Center	253,971.03
Holiday Food Fund	1,150.00
Idyllwild Children's Fund	4,057.93
Medical	3,750.00
Utility Fund	125.00
Donations - Other	139,125.86
Total Donations	403,369.66
Fundraisers	
A Change For A Change	370.00
Fashion Show	
Sponsors	3,685.00
Ticket sales	2,396.00
Fashion Show - Other	140.00
Total Fashion Show	6,221.00
Play	150.00
Special Appeal	
Sponsors	300.00
Special Appeal - Other	17,905.00
Total Special Appeal	18,205.00
Total Fundraisers	24,946.00
Grant funds	
Bank of America	7,489.31
CDBG Grant	40,000.00
Community Fund	4,036.00
Emer. Food & Shelter Program	9,077.00
Medical	7,750.00
Youth Grant Makers	580.00
Total Grant funds	68,932.31
Interest	18.35
Investment Acct Interest Income	1,932.26
Thrift Store Sales Income	
Thrift Store Cash Sales	120,409.57
Thrift Store Credit Card Sales	49,440.13
Thrift Store Sales Income - Other	456.98
Total Thrift Store Sales Income	170,306.68
Total Income	670,235.23
Gross Profit	670,235.23
Expense	
Bank service charge	
Merchant Service Fees	2,272.54
Paypal	147.80
Bank service charge - Other	429.75
Total Bank service charge	2,850.09
Distribution of Grant Fund	65,674.74
Dues and Memberships	50.00
Franchise Tax Board	10.00



2:00 PM  
10/25/17  
Cash Basis

Idyllwild HELP Center  
Profit & Loss  
July 2016 through June 2017

	Jul '16 - Jun 17
Fund Raising Costs	
Services	150.00
Fund Raising Costs - Other	3,837.25
Total Fund Raising Costs	3,987.25
Help Center	
Advertising	179.10
Food	152.52
HC Employees	
C.S.A. Wages	32,964.00
Executive Director	42,260.00
Total HC Employees	75,224.00
Insurance	
Accident Ins.	100.00
Directors & Officers	1,500.00
General Liability, Auto Liabli	1,270.00
Interest	33.75
Property Insurance	2,098.00
Umbrella	600.00
Total Insurance	5,601.75
Maintenance	
Forest Lumber	749.80
General Maintenance	90.00
Grounds Maintenance	100.00
Pavement plowing	112.50
Pest Control	87.50
Supplies	303.15
Total Maintenance	1,442.95
Mileage Reimbursement	511.18
Office	
Computer Repairs & Maintenance	511.50
Computer Software	56.33
Gifts	77.40
Postage	282.00
Subscription	379.95
Supplies	2,430.89
Office - Other	49.09
Total Office	3,787.16
Property Taxes	2,220.64
Utilities	
Idyllwild Water	803.40
Propane	811.08
SCE	1,500.56
Verizon	2,231.19
Waste Management	1,703.49
Total Utilities	7,049.72
Total Help Center	96,169.02
IRA Fees	1,026.93
MISC	1,000.00
Payroll Expenses	27,337.55
Professional	
Accountant	250.00
Bookkeeping	2,266.00

2:00 PM  
10/25/17  
Cash Basis

Idyllwild HELP Center  
**Profit & Loss**  
July 2016 through June 2017

	Jul '16 - Jun 17
Grant Writer	9,060.00
Total Professional	11,576.00
State Board of Equalization	12,159.66
State Compensation Fund	
TS workmans comp	1,164.09
State Compensation Fund - Other	2,504.25
Total State Compensation Fund	3,668.34
Thrift Store	
Employees	
Thrift Store Staff	35,271.93
Thrift Store Manager	26,910.00
Total Employees	62,181.93
General Maintenance	
Forest Lumber	608.07
Grounds	433.18
Pavement plowing	202.50
Pest Control	87.50
Supplies	1,459.00
Total General Maintenance	2,790.25
Office Supplies	663.55
Utilities	
Idyllwild Water	1,287.44
Propane	811.08
SCE	935.14
Verizon	1,083.75
Waste Management	1,975.19
Total Utilities	6,092.60
Total Thrift Store	71,728.33
Zurich Workman Comp Help Center	1,785.33
Zurich Workman Comp Thrift Stor	2,479.83
Total Expense	301,503.07
Net Ordinary Income	368,732.16
Net Income	368,732.16

# **IDYLLWILD HELP CENTER BOARD OF DIRECTORS**

**April 21, 2018**

## **Larry Bischof:**

**Past and Present Volunteer Service: Idyllwild HELP Center Treasurer.** Larry Bischof has been a “Hill” resident since 1984. Relocating from Los Angeles to Mountain Center with his family in search of a more family-friendly environment, he has never looked back. The Bischof’s started Harmony Farms, a feed store and garden nursery to serve the needs of the local community. Founding member of the Hill MAC, appointed by Riverside County Supervisor Kay Cenicerros, then publicly elected, Little League and basketball coach, Sunday School teacher and now on the Board of the HELP Center, Larry has always been committed to the mountain community in work and deed. A 30-year veteran and award-winning motion picture and television screenwriter, he worked with the likes of Dick Clark and Michael Landon (to drop a couple names). When given an opportunity by broker Shane Stewart of Hilltop Realty to become a licensed real estate agent, Larry seized the opportunity. For the past decade and a half he has assisted residents and visitors, garnering coveted awards as a top producing realtor highly regarded by both clients and colleagues.

## **Mark Galluzzo:**

**Idyllwild HELP Center Board.** During my working career I have given financial and hands-on support to many charitable organizations, as well as being an American Youth Soccer Organization soccer coach, PTA member, High School Music Boosters President, and project leader for yearly community rebuilding projects through my employer (Boeing). Since my retirement (3 yrs ago), I have been volunteering for Habitat for Humanity, repairing senior citizens’ homes to address safety issues and donated food, money, and construction time to the Idyllwild Help Center. I have an engineering degree with business management, program management and building construction experience, and have run small businesses. I have always been a strategic thinker looking for practical solutions to create the conditions for successful outcomes. I have owned a home in Pine Cove since 2007 and, although not a full time resident, I look forward to supporting the Idyllwild community and working with like minded people to make a difference.

## **Carla Mann:**

**Past and Present Volunteer Service: Idyllwild HELP Center Secretary.** Carla Mann retired from a 30+ year career with a Fortune 500 Company in San Diego, California where she worked her way up from an entry level customer service representative to manager of a team responsible for the design and implementation of employee and leadership development programs. She holds a Bachelor’s of Business Administration from the University of San Diego and a Master of Arts in Educational Technology from San Diego State University. Ms. Mann retired in 2015, she and her husband relocated to Idyllwild, California in 2016, and she has been serving on the Idyllwild Help Center Board of Directors since January 2017.

## **Bruce Ross:**

**Idyllwild HELP Center Board.** Bruce is a partner in the LA office of the international law firm, Holland & Knight. He has 45 years of experience in estate, trust, and protective proceedings litigation and professional responsibility cases. Bruce is a frequent lecturer and writer on legal topics and authors the premier guidebook for lawyers in California handling probate administration and litigation matters. Bruce has a long, varied association with Idyllwild, beginning back in the 60’s, recreating, living in, and serving the Idyllwild community – and including rock climbing, serving on the Pine Cove Water District Board, volunteer firefighter, and current owner of the Red Kettle restaurant. A member of several charitable boards and a frequent volunteer for charitable causes, Bruce is proud to be on IHC’s Board and a member of the Idyllwild Community Fund’s Advisory Committee. He hopes to utilize his expertise in the fields of charitable corporations and charitable giving to benefit the IHC and Idyllwild community.

**Callie Wight:**

**Past and Present Volunteer Service: Idyllwild HELP Center President.** Callie Wight, now retired, has been a California State licensed Registered Nurse for 40 years and was in practice as a psychotherapist for 30. Ms. Wight holds two Masters of Art degrees; one in Human Development from Pacific Oaks College in Pasadena, California. The other is in Psychology from the California School of Professional Psychology in Los Angeles, California. Ms. Wight is all but dissertation in a Doctorate degree in Clinical Psychology from the latter institution. From 1990 to 2014, Ms. Wight was employed by the Veterans Health Administration Greater Los Angeles Healthcare System (GLAHS) as Sexual Trauma Counselor for women Veterans; as Military Sexual Trauma Coordinator, and as Women Veterans Program Manager (WVPM). As WVPM, she was a member of the Department of Veterans Affairs national Women's Health Services. Specifically, she was responsible to advocate for and support GLAHS healthcare facility's effort to meet the needs of women Veterans across a five county healthcare system by monitoring, planning and developing healthcare and mental health care programs for those Veterans. Ms. Wight has also actively volunteered in community-based 501(c) (3) not-for-profit organizations in Los Angeles County, advocating for social justice and for social responsibility. She served on several Boards of Directors or in key planning, organizing, and decision-making roles. Her longest period of volunteer work, approximately five years, was with the Los Angeles Area Program Office of the American Friends Service Committee (AFSC). She served there as chair (referred to by Quakers as the committee Clerk) of the Los Angeles Area Program Committee. The committee supported and helped to direct paid staff of AFSC in their work with needy local communities. In addition, Ms. Wight simultaneously served as a member of the AFSC Pacific-Southwest Regional Executive Committee. Ms. Wight's volunteer service included being a member of the Board of Directors of the Pasadena local chapter of the American Civil Liberties Union. She has been active in the Coalition for Justice and Peace and the Free Pacifica Neighborhood Network. In 2013, Ms. Wight was a Nursing Excellence GEM Award Regional Finalist. Ms. Wight is also a certified Mind/Body Health and Wellness Coach trained in the Circle of Life Coaching System and as a nurse is trained in Healing Touch. In 2014, when Ms. Wight retired, she relocated to Idyllwild, California. She is involved with several volunteer activities in her new community. She has been serving on the Idyllwild Help Center Board of Directors since early 2015.

Email: [quitefree1@gmail.com](mailto:quitefree1@gmail.com)

**Consultants**

**Doug Austin**

**Larryn Carver**

**Phil Drell**

**Shannon Ng, MLIS**

**Charlie Richards**

**Ian Schoenlebbber**

**Elliot Spokane**

**Barry Zander**

#79



**COMPLETE**

Collector: Web Link 1 (Web Link)  
Started: Wednesday, April 20, 2016 3:35:24 PM  
Last Modified: Wednesday, April 20, 2016 4:02:16 PM  
Time Spent: 00:26:51  
IP Address: 108.38.191.45

PAGE 1

<b>Q1: Name of your organization.</b>	Idyllwild HELP Center (IHC)
<b>Q2: Grant #</b>	20150045
<b>Q3: Grant Period</b>	March 1, 2015 to February 28, 2016
<b>Q4: Location of your organization</b>	
City	Idyllwild
State	California
<b>Q5: Name and Title of person completing evaluation.</b>	Colleen Meyer Executive Director
<b>Q6: Phone Number:</b>	951-659-2110
<b>Q7: Email address.</b>	ed@idyllwildhelpcenter.org

PAGE 2: Key Outcomes and Results

<b>Q8: Total number of clients served through this grant funding:</b>	Medical Funding 61 clients, 67 clients medical transportation
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**Q9: Describe the project's key outcomes and results based on the goals and objectives:**

The primary goal for the Rural Healthcare Assistance Voucher program is to provide financial access (healthcare assistance vouchers) and/or physical access (transportation vouchers) to low- income seniors in need of medical care.

Objective I: Increase the number of seniors served by the IHC Rural Healthcare Assistance Voucher program. Currently, we do not have reserved funds for our senior clients within this program, thus we could restrict these funds to assist more seniors and still continue to support our young families and children.

Outcome: The IHC was able to increase assistance to our 55 + clients. Previously we had been able to assist approximately 35 55+ clients with limited (\$100) medical assistance which included prescription assistance, Medical co-pays, transportation costs, utility assistance for medically fragile 55+ clients. We were able to increase our 55+ client base served to 61 clients for medical assistance and 67 clients needing medical transportation assistance.

Objective II: Increase the total amount of aid available from \$100 to \$200.

Activities: We were able to increase the assistance towards medical services from \$100 to \$200 and for transportation costs from \$25 to \$50.

Objective III: Increase the amount of transportation aid clients can receive from \$25 to \$50.

Activities: We were able to increase the assistance towards transportation costs from \$25 to \$50.

**Q10: Please describe any challenges/obstacles the organization encountered (if any) in attaining goals & objectives.**

An unanticipated challenge that impacted our work was the sudden retiring of Karen Patterson, who had been the Executive Director of the IHC since April 2007; Karen retired April 30, 2015. I, Colleen Meyer, had the honor of working with Karen since July of 2007; I was the Client Services Administrator (CSA) and had the opportunity to impact this community since the beginning. The initial challenge was during the transition of my promotion to Executive Director. The Idyllwild HELP Center did experience significant changes during the grant period in addition to my promotion; Skye Zambrana was promoted from Thrift Store Consultant to Client Services Administrator and had been a client of the HELP Center since 2009. We had the opportunity to give a client a "hand up" to be a success story. Our previous Board President Deanna Collins, who had been with the organization for over 9 years, passed away in March 2015 and our Vice President Nanci Killingsworth became Board President.

**Q11: How did you overcome and/or address the challenges and obstacles?**

The challenges that the Idyllwild HELP Center faced during the grant period were the retiring of Executive Director Karen Patterson and the untimely passing of our Board President Deanna Collins. We overcame the challenges by promoting staff within. Today our staff and board team are stronger and more cohesive than ever. I am pleased to report that throughout the staff/board transitions, IHC services to clients continued consistently and without interruption.

**Q12: Describe any unintended positive outcomes as a result of the efforts supported by this grant.**

The unexpected success of the funding Idyllwild HELP Center (IHC) received from S.L. Gimbel was the degree of dramatic improvement in our clients' quality of life. We have been able to provide our clients with assistance with high cost life-saving prescriptions, the gift of sight with the help of glasses, what would be devastatingly large out-of-pocket medical bills from hospital visits, gas vouchers to medical appointments, necessary dental work, vouchers to the pharmacy to get much needed over-the-counter medication and critically needed medical treatments. The funding we have received has helped us help our community and for our clients to retain their dignity, as we help to empower them.

**Q13: Briefly describe the impact this grant has had on the organization and community served.**

The IHC clients are 67% seniors (55+) and disabled. All are no- or low-income. Your generous grant has impacted our in rural mountain community immeasurably by giving clients who are economically challenged an opportunity to health care that they would not otherwise have had. In our rural mountain community, the saying "neighbors helping neighbors" truly applies. The loss of a community member is felt throughout and it is very humbling to say this, we are grateful for the opportunity to partner with your incredible agency, which has allowed us to help our less fortunate neighbors. Because of the assistance through S.L. Gimbel fund, we have improved the quality of life for our elderly neighbors -- and for some, they received a gift of a future that they didn't have before.

With the S.L. Gimbel Foundation's very generous grant we made an extraordinary impact for so many disadvantaged individuals. These are just a few of the (67) people we have helped with your grant: we were able to help an elderly woman with significantly limited vision, she is a single woman and has been incredibly limited and because of the funding we had received from S.L. Gimbel we were able to provide her with glasses that have dramatically improved her quality of life. Another client had to have emergency back surgery in November, in December she had large out-of-pocket costs that would have significantly impacted her and her husband's quality of life in regards to paying the bills; due to S.L. Gimbel funding we were able to pay them for her. She now does not have to choose between buying food, paying heating costs, or paying her medical bills. We were able to help a grandmother raising her 3 grandchildren; one is medically fragile, with gas vouchers to get to her doctor appointments to receive treatment for Lupus. We were able to help an elderly homeless man who has been hiking the PCT after he lost his job and house 4 years ago, with a voucher to the pharmacy to purchase over-the-counter items to help with a significant injury to his foot that impacted his ability to walk to the grocery store to use his food stamp card to buy food. We have been able to help a client with the cost of dental work: he had a serious infection in his mouth which was creating a much larger issue for him, it greatly impacted his quality of life. Because of S.L. Gimbel he was able to have the tooth removed and could heal.

## S.L. Gimbel Foundation Fund

### Q14: Please provide a brief narrative on how the funds were used to fulfill grant objectives.

Healthcare vouchers: Financial support for medical office visits, co-pays, labs, and medical prescriptions  
(\$166.40 x 61 = \$10,150 )

Transportation support: Gas vouchers for travel to medical care visits  
(\$50 x 67 participants = \$3,350)

## PAGE 4: Success Stories

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### Q15: Please relate a success story:

In addition to the client impact stories in Question 13, we would like to share one more success story made possible by your support: A client who had Hepatitis-C was able to use transportation vouchers made possible through S.L. Gimbel funding to go to the Doctor to receive treatments to cure his Hepatitis-C. After he was well, a tumor was discovered on his liver. And again because of the gas vouchers, he was able to get to his surgeon and every appointment he had, and the tumor was removed. His year started out with having a terminal illness that limited his life – and financially he could not afford to get to appointments and receive treatments. But because of the funding through S.L. Gimbel Foundation, he is now CURED! His year ended with hope and a future he would not have had without the assistance through S.L. Gimbel fund. Thank you!

### Q16: Please relate a success story here:

*Respondent skipped this question*

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

*Respondent skipped this question*

## PAGE 5: Organizational Information

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### Q18: Which category best describes the organization. Please choose only one.

Basic Needs Support

### Q19: What is the organization's primary program area of interest?

Food Bank

### Q20: Percentage of clients served through grant in each ethnic group category. Total must equal 100%

*Respondent skipped this question*

### Q21: Approximate percentage of clients served from grant funds in each age category.

*Respondent skipped this question*

### Q22: Approximate percentage of clients served with disabilities from grant funds.

*Respondent skipped this question*

### Q23: Approximate percentage of clients served in each economic group.

*Respondent skipped this question*

### Q24: Approximate percentage of clients served from grant funds in each population category.

*Respondent skipped this question*

**Questions 16-24 are optional questions and relate to demographic information on clients served. This helps us provide a broader picture of your organization and populations being served.**

(Q16-17 optional space to relate additional success stories)

18. Which category best describes the organization. Please choose only one.

Non-profit

19. What is the organization's primary program area of interest?

Basic human services

20. Approximate percentage of clients served through grant in each ethnic group category. Total must equal 100%

We are a small non-profit with 2 staff members and we do not track this information. Please know that our clients are ethnically diverse.

21. Approximate percentage of clients served from grant funds in each age category. All 55+

22. Approximate percentage of clients served with disabilities from grant funds. We are a small non-profit with 2 staff members and we do not track this information.

23. Approximate percentage of clients served in each economic group. 100%. All clients served are low income qualified.

24. Approximate percentage of clients served from grant funds in each population category.

We are a small non-profit with 2 staff members and we do not track information in the way you are asking.





STATE OF CALIFORNIA  
FRANCHISE TAX BOARD  
PO BOX 1286  
RANCHO CORDOVA CA 95741-1286

In reply refer to  
755:G :GRW

January 3, 2011

IDYLLWILD HELP CENTER  
PO BOX 660  
IDYLLWILD CA 92549-0660

Purpose : CHARITABLE  
Code Section : 2370ld  
Form of Organization : Corporation  
Accounting Period Ending: June 30  
Organization Number : 1838250

#### EXEMPT DETERMINATION LETTER

This letter confirms your previous exemption from state franchise and income tax under Section 2370ld, Revenue and Taxation Code. In confirming your exempt status, we have made no examination of your current activities. If the organization has changed its operation, character, or purpose since exemption was originally granted, that change must be reported immediately to this office.

The tax-exempt status is effective as of 06/01/1992.

To retain exempt status, organizations are required to be organized and operating for nonprofit purposes within the provisions of the above section. An inactive organization is not entitled to exemption.

For filing requirements get, FTB Pub. 1068, Exempt Organizations - Filing Requirements and Filing Fees. Go to [ftb.ca.gov](http://ftb.ca.gov) and search for 1068.

Note: This exemption is for state franchise or income tax purposes only.

G WALKER  
EXEMPT ORGANIZATIONS  
BUSINESS ENTITIES SECTION  
TELEPHONE (916) 845-4171  
FAX NUMBER (916) 845-9501

RTF:



Department of the Treasury  
Internal Revenue Service  
P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0248667580  
Sep. 07, 2010 LTR 4168C E0  
33-0496201 000000 00

00018538  
BODC: TE

IDYLLWILD HELP CENTER  
PO BOX 660  
IDYLLWILD CA 92549-0660

113030

Employer Identification Number: 33-0496201  
Person to Contact: Mr. Lockhart  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Aug. 26, 2010, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in October 1992.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

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

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

Sincerely yours,

Michele M. Sullivan, Oper. Mgr.  
Accounts Management Operations I