

11/14 RESUBMIT (9)



# 2014 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:  
Grant #: 20140820

\$23,250

## Organization / Agency Information

<b>Organization/Agency Name:</b> Jefferson Area Board for Aging, Inc. ("JABA") 21153		
<b>Physical Address:</b> 674 Hillside Drive, Suite 9		<b>City/State/Zip</b> Charlottesville, VA 22901
<b>Mailing Address:</b> Same as above.		<b>City/State/Zip</b>
<b>CEO or Director:</b> Marta Keane		<b>Title:</b> Chief Executive Officer
<b>Phone:</b> 434.817.5238	<b>Fax:</b> 434.817.5230	<b>Email:</b> mkeane@jabacares.org
<b>Contact Person:</b> Kim Peel		<b>Title:</b> Chief Development Officer
<b>Phone:</b> 434.817.5221	<b>Fax:</b> 434.817.5230	<b>Email:</b> kpeel@jabacares.org
<b>Web Site Address:</b> www.jabacares.org		<b>Tax ID:</b> 54-0990078

## Program / Grant Information

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

<b>Program / Project Name:</b> Long-Term Care Ombudsman Program		
<b>Amount of Grant Requested:</b> \$23,250	<b>Total Organization Budget:</b> \$5,319,476	<b>Percentage of Organization's Total Budget used for Administration:</b> 8%
<b>Purpose of Grant Request (one sentence):</b>  The purpose of this grant request is to help build the capacity of JABA's Long-Term Care Ombudsman Program through the addition of Volunteer Ombudsmen.		
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b>  n/a		

## Signatures

<b>Board President / Chair: (Print name and Title)</b> M. E. "Dick" Gibson, Jr., Chair, Board of Directors	<b>Signature:</b> <i>M. E. Gibson</i>	<b>Date:</b> 6/25/14
<b>Executive Director/President: (Print name and Title)</b> Marta M. Keane, Chief Executive Officer	<b>Signature:</b> <i>Marta M. Keane</i>	<b>Date:</b> 6/25/14



## **Long-Term Care Ombudsman Program**

*Promoting Quality Care, Individual Rights and Personal Dignity for Vulnerable Seniors and Disabled Individuals in Central Virginia*

### **I. JABA's Background & Target Population**

**History & Mission.** Since 1975, JABA has served older adults, their families and caregivers throughout central Virginia. From our roots as a federally-mandated Area Agency on Aging, JABA is widely recognized as the organization to turn to for aging information, support, advocacy and services. We provide a seamless experience of prevention-focused services to older adults so they can stay healthy, safe and independent for as long as possible, preventing or delaying the need for high-cost institutionalization. Working with many community partners, JABA rises to the challenge of its mission: *to promote, establish and preserve sustainable communities for healthy aging that benefit individuals and families of all ages.*

**Accomplishments.** JABA has received state and national recognition for our innovations in providing services to seniors, including the Generations United/Met Life Best Intergenerational Communities Award (2012). This year, we received the Aging Innovation Award from the National Association of Area Agencies on Aging (N4A) for our "Wills for Seniors" program.

**Key Programs & Activities.** Last year, JABA provided a full spectrum of services to over 9,550 individuals in our area. These services include: long-term care ombudsman; health services; older adult community centers; home-delivered meals; adult day care centers; health insurance and financial wellness counseling; information and assistance; options counseling; assisted living facility; affordable senior housing units; and much more.

**Geographical Areas & Communities Served.** JABA provides services to older adults throughout central Virginia (Charlottesville and the counties of Albemarle, Fluvanna, Greene, Louisa and Nelson), regardless of ability to pay. Top priority is given to those in greatest need, with a focus on low-income, rural and minority populations over the age of 60. About 70% of our older clients are female. About 49% are African-American and 48% are white.

### **II. Long-Term Care Ombudsman Program**

**Statement of Need.** JABA's Long Term Care (LTC) Ombudsman Program advocates for, educates, and works to empower people living in nursing homes and assisted living facilities, as well as those receiving community-based services at home. Our goal is to assist individuals in maintaining their legal rights, personal dignity and control over their lives. The elderly are especially vulnerable to abuse, neglect and exploitation as they become increasingly dependent on others to assist with physical care, financial affairs and other needs. In the next decade, the 65+ population in the greater Charlottesville area will increase by 109%. This "aging tsunami" is arriving at the same time as state and national policy changes that will increase the number of people receiving long-term care at home, rather than in institutions. While community-based care is preferred, JABA's Ombudsman Program will be stretched to the limit as we see our client base rise from 3,710 people last year to as many as 6,700 in the next few years. In the past, our clients have typically been concentrated in long-term care facilities, creating efficiencies in providing services. As we reach out to an increasing – and increasingly spread out – population of individuals receiving at-home care, we must build sustainable capacity to meet this need. Our

paid Ombudsman staff members (1.5 FTE) currently depend on a small, dedicated cadre of Volunteer Ombudsman. We ask for support from the S.L. Gimbel Foundation Fund to build greater, sustainable capacity by recruiting and training more Volunteer Ombudsmen.

**Project Goal, Objectives and Methodology.** JABA currently provides Ombudsman services at 12 nursing homes and 17 assisted living facilities, offering advocacy and access to intervention to 3,710 elderly and/or disabled adults last year. *Our goal is to provide quality services to our current client base in long-term care facilities while reaching out to serve the growing number of individuals receiving community-based care at home.* This can be accomplished by: 1) leveraging the skills of our two state-certified paid staff members (1.5 FTE) with a larger contingent of highly trained Volunteer Ombudsmen who can provide a more extensive presence in long-term care facilities; and 2) providing awareness of the Ombudsman Program to individuals receiving at-home care who might not otherwise know about their rights. Project objectives over the next fiscal year (October 2014 – September 2015) are summarized below.

1. Identify, investigate, and work to resolve 80 complaints made by or on behalf of long-term care recipients.
  - Activities: a) interviews; b) consultations; c) site visits to long-term care facilities; and d) referrals and reporting of violations to state licensing agencies.
2. Provide information, consultation and community education to 320 residents, family members, members of the public, long-term care providers, hospitals and social service agencies.
  - Activities: a) maintain a long-term care hotline, providing information and referral on residents' rights, laws and regulations, good care practices, long-term care options and services, and self-advocacy; b) conduct community presentations; and c) conduct training for long-term care facility staff.
3. Increase the number of Volunteer Ombudsmen from 7 to 14 people, resulting in a total of 2,880 hours of direct advocacy services, a 100% increase over the current year.
  - Activities: a) recruit, train and supervise volunteers to expand the Ombudsman Program's watchful and supportive presence in long-term care facilities; and b) weekly site visits (minimum 4 hours each) to these facilities.
4. Create and print written materials to distribute at hospitals and other locations to increase awareness of the protections offered by the Ombudsman Program to a growing number of individuals receiving community-based care at home.

**Target Population.** Ombudsman services are available to *any* individual receiving long-term care, whether in a nursing home, assisted living facility or at home. In practice, the vast majority of our clients are elderly (65+ years of age). Last year, our Ombudsman Program reached 3,710 individuals and their families. We anticipate this number to expand to as many as 6,700 in the next couple of years, as more people receive community-based care at home.

**Community Partners and Volunteers.** As the designated Area Agency on Aging for Virginia's Planning District 10, JABA is the only entity providing Ombudsman services in the greater Charlottesville area. We work cooperatively with long-term care providers, regulatory agencies and Adult Protective Services. Volunteer Ombudsmen demonstrate their dedication through extensive training and commitment to a minimum of four (4) volunteer hours per week.



**Project Outcomes and Evaluation.** Success will be evaluated based on achievement of the above-stated objectives and performance data collected and shared with the Virginia Department of Health and the Office of the State Ombudsman.

**Use of Grant Funds.** An investment in the amount of \$23,250 from the S.L. Gimbel Foundation Fund will: 1) help build the capacity of JABA's Ombudsman Program by increasing the number of Volunteer Ombudsman; and 2) create awareness of Ombudsmen services to a growing number of individuals receiving community-based care at home. In the first instance, funds will be used for staff salaries/benefits for time invested in building the capacity of the Volunteer Ombudsman portion of the program, training/supplies for volunteers, professional development, and mileage reimbursement. In the second, funds will be used to create, print and distribute written materials about the Ombudsman Program to hospitals and other locations.

### **III. Sustainability of the Long-Term Care Ombudsman Program**

JABA is committed to providing a strong Long-Term Care Ombudsman Program and has done so for nearly 40 years. JABA wants not only to sustain its current Ombudsman services but continue to innovate to meet the needs of a growing population of individuals. Our immediate strategy is to leverage the skills of our paid staff by increasing the number of Volunteer Ombudsman who can provide consistent coverage "on the ground" at long-term care facilities. In the long term, we will continue to seek philanthropic support for the Ombudsman Program from other foundations, businesses and individual donors.

### **IV. JABA's Governance, Executive Leadership and Key Staff Qualifications**

**Governance.** JABA's Board of Directors consists of 16 total representatives from Charlottesville and the counties of Albemarle, Fluvanna, Greene, Louisa and Nelson, plus between 6-9 at large members appointed by the Board. Each member has an equal vote in all matters before the Board, and serves a two-year term. All actions before the Board are vetted by ad hoc committees (Ethics; Finance; Business Development). Two standing committees (Executive; Advisory Council) then make recommendations to the full Board of Directors. Robert's Rules of Order are followed by the Board and standing committees.

**Executive Leadership.** Marta Keane became JABA's Chief Executive Officer in 2013. A career-long healthcare industry professional with more than 26 years of experience primarily focused on elders, Marta came to JABA from Encore Healthcare, LLC, where she was vice president of Rehab and Wellness.

**Key Staff Qualifications.** JABA's Long-Term Care Ombudsman Program is supported by two staff members, one of whom is part-time. *Sue Drumm* has been Ombudsman Program Manager at JABA since 2005, with a long professional history advocating on behalf of vulnerable, low-income and underserved populations. After earning her J.D. from the University of Virginia School of Law in 1984, she worked for years as staff attorney for the Charlottesville-Albemarle Legal Aid Society. *Mary Rafaly* works part-time at JABA as a Long-Term Care Ombudsman. Mary has a Bachelor of Social Work (B.S.W.) and spent her early career working for Adult Protective Services and Child Protective Services. She came to JABA after working for ten years as a clinical social worker in support of AIDS/HIV patients and their families at the University of Virginia Health System.

## 2014 S.L. Gimbel Foundation APPLICATION

### V. Project Budget

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

Line Item Description	Line Item Explanation (Formula/equation used as applicable. Example: 40 books @ \$100 each = \$4000)	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Salaries & Benefits	1.5 FTE	\$6,971	\$50,638	\$13,150	\$70,759
Rent & Phone/Internet		\$628	\$4,560	-0-	\$5,188
Supplies & Equipment		-0-	-0-	\$550	\$550
Printing/Postage		\$90	\$653	-0-	\$743
Transportation	Reimburse mileage to travel to LTC facilities, etc. @ \$.50 per mile	-0-	-0-	\$3,000	\$3,000
Professional Training		-0-	-0-	\$2,000	\$2,000
Subscriptions, Dues & Misc.		\$98	\$713	-0-	\$811
Development Costs		\$636	\$4,617	-0-	\$5,253
Marketing & Awareness		-0-	-0-	\$4,550	\$4,550
Indirect Costs		\$1,457	\$10,582	-0-	\$12,039
<b>TOTALS:</b>		\$9,880	\$71,763	\$23,250	\$104,893

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

#### *Secured/Awarded*

Name of Funder: Foundation, Corporation, Government	Amount

#### *Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Federal, state, and local revenue	\$71,764	varied
JABA income from mission-related partnerships	\$ 9,879	varied

**VII. Financial Analysis**

**Agency Name:** Jefferson Area Board for Aging ("JABA")  
**Most Current Fiscal Year (Dates):** From 10/1/13 To: 9/30/14

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

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

<b>Program Expenses</b>	<b>/Total Operating Expenses</b>	<b>= Program Expense Ratio</b>
\$3,007,570	\$3,445,002	87 %

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

<b>Administrative Expense (100%-Program Expense ratio) per 990 above</b>	<b>Percentage of Organization’s Current Total Budget used for Administration (from cover page)</b>	<b>Differential</b>
13 %	8 %	5 %

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

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

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$1,737,445	\$1,185,503	\$1,122,260	2.6

**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>
(\$16,023)	\$1,266,227

**Notes:** Of the \$1,266,227 excess, \$1,060,000 was revenue to JABA from CDBG Federal Home Loan Bank, state monies for an affordable housing project now completed.

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

<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>	<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>
Contributions	\$ 348,302	6.5%	Program Fees	\$ 673,995	12.7%
Fundraising/Special Events	\$ -0-	-0-	Interest Income	\$ 92,800	1.7%
Corp/Foundation Grants	\$ 199,716	3.8%	Kitchen Income	\$ 542,204	10.2%
Government Grants	\$2,653,047	49.9%	Contract/Rental Revenue	\$ 809,717	15.2%

**Notes:** JABA does not host special fundraising events.

**JABA & JABA, Inc.**  
**Board of Directors**

[Revised 03.25.14]

Chairman: Dick Gibson  
Vice Chair: Mozell Booker

Secretary: Willie Gentry  
Treasurer: Bill Hughes

<u>NAME</u>	<u>COMMITTEE/JURISDICTION*</u>	<u>TERM</u>
<b>Michael Ashby, MD</b> 327 Dover Road Charlottesville, VA 22901 (o) 434-654-7308; (f) 434-654-4419 Email: <a href="mailto:fmashby1@sentara.com">fmashby1@sentara.com</a>	<b>Jurisdiction: At-Large</b> Care Advantage Plus Board Member Blue Ridge PACE Board Member Vice President of Medical Affairs, MJH	02/01/14 – 01/31/16
<b>Mozell H. Booker</b> Post Office Box 284 Fork Union, VA 23055 (h) 434-842-3311; (o) 434-589-4342; (c) 434-987-0038; (f) 434-842-1303 Email: <a href="mailto:mhbooker@mindspring.com">mhbooker@mindspring.com</a>	<b>Jurisdiction: Fluvanna</b> <b>Board Vice-Chair</b> <b>Executive Committee</b> <b>Human Resources Committee</b> Fluvanna County Board of Supervisors	03/01/14 – 02/28/16
<b>Constance (Connie) Brennan</b> 524 Buck Creek Lane Faber, VA 22938 (h) 434-263-4690; (o) 434-263-7003 (c) 434-996-5246 Email: <a href="mailto:connie@cstone.net">connie@cstone.net</a>	<b>Jurisdiction: Nelson</b> <b>Ethics Committee</b> Nelson County Board of Supervisors	06/11/13 – 07/15/15
<b>Richard Brewer</b> 2212 Ambrose Way Charlottesville, VA 22901 (o) 434-220-1055; (h) 434-249-2037; (f) 434-295-4851 Email: <a href="mailto:Richard@CommonWealthAL.com">Richard@CommonWealthAL.com</a>	<b>Jurisdiction: At-Large</b> President, Commonwealth Assisted Living	06/24/13 – 06/30/15
<b>Milton T. Edgerton, MD</b> 2245 Garth Road Charlottesville, VA 22901 (h) 434-977-3870; (f) 434-296-4042 772-545-3444 (January-March) 518-523-2215; (f) 518-523-8036 (August-September) Email: <a href="mailto:miltedgerton@gmail.com">miltedgerton@gmail.com</a>	<b>Jurisdiction: Emeritus</b> <b>Finance Committee</b> Human Resources Committee	
<b>Rod Gentry</b> Union First Market Bank 1658 State Farm Boulevard Charlottesville, VA 22911 (h) 434-964-1982; (o) 434-970-1162; (c) 434-989-3000; (c) 434-760-0911; (f) 434-970-1422 Email: <a href="mailto:rod.gentry@bankatunion.com">rod.gentry@bankatunion.com</a>	<b>Jurisdiction: At-Large</b> <b>Business Development Committee</b>	03/25/13 – 03/31/15

<p><b>Christina (Krissy) Lester</b> Wal-Mart Distribution Center #7016 10695 Freedom Trail Gordonsville, VA 22942 (o) 540-832-1006; (f) 540-832-1024 Email: <a href="mailto:Christina.Lester@wal-mart.com">Christina.Lester@wal-mart.com</a></p>	<p><b>Jurisdiction: At-Large</b> <b>Volunteer Council Liaison</b> <b>Executive Committee</b> <b>Human Resources Committee Chair</b></p>	<p>02/01/14 – 01/31/16</p>
<p><b>Sue Lewis</b> 1615-B Amherst Street Charlottesville, VA 22903 (h) 434-295-1485 Email: <a href="mailto:swlcville@embarqmail.com">swlcville@embarqmail.com</a></p>	<p><b>Jurisdiction: Charlottesville</b> <b>Finance Committee</b></p>	<p>03/17/14 – 04/01/16</p>
<p><b>Richard (Dick) Lindsay, MD</b> 352 Key West Drive Charlottesville, VA 22911 (h) 434-293-9769; (c) 434-981-2892 Email: <a href="mailto:rwl3w@virginia.edu">rwl3w@virginia.edu</a></p>	<p><b>Jurisdiction: Albemarle</b> <b>Executive Committee</b> <b>Advisory Council Chair</b> Blue Ridge PACE Board Member Blue Ridge PACE Services &amp; Education Committee</p>	<p>03/13/13 – 03/31/15</p>
<p><b>James H. McGrath, III</b> 500 Crestwood Drive, Apt. 2201 Charlottesville, VA 22903 (h) 434-295-8257 Email: <a href="mailto:jhm3c@comcast.net">jhm3c@comcast.net</a></p>	<p><b>Jurisdiction: Albemarle</b> Long Range Planning Committee</p>	<p>10/03/12 – 10/20/14</p>
<p><b>Diantha McKeel</b> 103 Smithfield Ct. Charlottesville, VA 22901 (c) 434-962-2403; (h) 434-296-4931 E-mail: <a href="mailto:dmkeel@albemarle.org">dmkeel@albemarle.org</a></p>	<p><b>Jurisdiction: At-Large</b></p>	<p>01/25/14 – 01/25/16</p>
<p><b>Leigh B. Middleditch, Jr.</b> McGuireWoods Consulting 310 Fourth Street, NE, Suite 300 Charlottesville, VA 22902 (o) 434-977-2543; (f) 434-980-2267 Email: <a href="mailto:lmiddleditch@mcguirewoods.com">lmiddleditch@mcguirewoods.com</a></p>	<p><b>Jurisdiction: At-Large</b></p>	<p>02/01/14-001-31-16</p>
<p><b>Constance (Consi) Palmer</b> 35 Old Farm Road Charlottesville, VA 22903 (h) 434-977-7220; (c) 434-906-0304 Email: <a href="mailto:consipalmer@gmail.com">consipalmer@gmail.com</a></p>	<p><b>Jurisdiction: Albemarle</b> <b>JEC Board Member</b></p>	<p>03/13/13 – 03/31/15</p>
<p><b>Elayne Phillips, PhD</b> 1105 Saint Charles Court Charlottesville, VA 22901 (h) 434-979-8958; (o) 434-243-6311 Email: <a href="mailto:ekp2e@virginia.edu">ekp2e@virginia.edu</a></p>	<p><b>Jurisdiction: Charlottesville</b> <b>Finance Committee</b></p>	<p>03/17/14 – 04/01/16</p>



DRAFT					
	A	B	C	D	E
1	<b>JABA &amp; JABA, Inc.</b>				
2	<b>Summary of all Programs for Budget Year 2013-14</b>				
3	<b>No.</b>	<b>Description</b>	<b>Agency</b>	<b>JABA, Inc.</b>	<b>JABA</b>
4		<b>Revenue</b>	<b>Totals</b>	<b>Totals</b>	<b>Totals</b>
5	4000	Federal Revenue	\$441,698	\$67,642	\$374,056
6	4010	Title IIIB	\$247,651		\$247,651
7	4020	State Revenue	\$110,201	\$40,350	\$69,851
8	4030	Local Revenue	\$1,066,628	\$203,693	\$862,935
9	4040	Fund Raising Revenue	\$348,302	\$111,918	\$236,384
10	4050	Client Fees	\$673,995	\$664,555	\$9,440
11	4070	Fdn/Program	\$193,319	\$129,625	\$63,694
12	4100	JABA Transfers			
13	4110	Miscellaneous			
14	4120	Rental Income	\$430,488	\$425,735	\$4,753
15	4280	Less Rental Subsidy	(\$97,531)	(\$97,531)	
16	4130	GA/Special Transportation	\$39,754		\$39,754
17	4140	GA/Community Base Svs.	\$108,565	\$93,924	\$14,641
18	4370	Federal Title III E	\$86,657		\$86,657
19	4160	GA/Home Delivered Meals	\$140,836		\$140,836
20	4170	Title III Match	\$22,174		\$22,174
21	4180	Interest Earned	\$92,800	\$75,000	\$17,800
23	4200	USDA Reimbursamens	\$81,613	\$41,772	\$39,841
24	4210	U.W. Allocallon			
25	4220	Medicald	\$229,863	\$225,363	\$4,500
27	4270	Contract Revenue	\$329,664	\$313,136	\$16,528
28	4310	U.W. Designated	\$6,397	\$500	\$5,897
29	4320	GA/Case Management	\$62,214		\$62,214
30	4330	GA/Ombudsman	\$15,193		\$15,193
31	4400	Catered Meals	\$542,204	\$542,204	
32	4990	Due from CAP	\$137,288	\$49,733	\$87,555
33		Carry Over funds	\$11,627		\$11,627
34		<b>Total Revenue</b>	<b>\$5,319,781</b>	<b>\$2,887,919</b>	<b>\$2,431,862</b>
35		<b>Expenditures</b>			
36	5100	Salaries - Executive	\$71,149	\$58,357	\$12,792
37	5120	Salaries - (25 hrs or more)	\$2,414,855	\$1,698,492	\$716,363
38	5110	Salaries - (less than 25 hrs)	\$583,229	\$277,902	\$307,327
39	5200	Thrift Plan (6%) (30 hrs or more)	\$98,206	\$54,456	\$43,749
40	5210	Annual Leave (4.3%) (20+ hrs)	\$69,005	\$39,027	\$29,978
41	5220	FICA (7.65%) (All staff)	\$169,982	\$90,691	\$79,291
42	5230	Health Ins. (9.35%)(25+hrs)	\$153,692	\$85,224	\$68,468
43	5240	Life & Disability Ins (1%) (30+hrs)	\$16,368	\$9,076	\$7,292
44	5250	Unemployment (.0129%)(All staff)	\$28,684	\$15,293	\$13,371
48	5420	Trans - Participant	\$19,722	\$2,000	\$17,722
47	5510	Meal Costs	\$662,003	\$296,521	\$365,482
48	6010	Rent	\$461,548	\$318,008	\$143,540
49	6000	Less Rental Subsidy	(\$92,451)	(\$85,685)	(\$6,767)
50	6030	Telephone	\$37,875	\$10,457	\$27,419
51	6040	Utilities - Gas	\$10,837	\$10,837	
52	6050	Utilities - Electric & Water	\$52,136	\$37,398	\$14,738
53	6110	Supplies - Office	\$13,407	\$3,885	\$9,522
54	6120	Supplies - Program	\$34,746	\$28,225	\$6,521
55	6130	Supplies - Medical	\$14,498	\$5,616	\$8,882
56	6140	Supplies - Custodial	\$6,317	\$6,000	\$317
57	6160	Equipment - Office	\$9,977	\$7,393	\$2,584
58	6170	Equipment - Program	\$12,758	\$7,300	\$5,458
59	6210	Equipment - Maint.	\$7,021	\$4,233	\$2,788
60	6220	Building Maintenance	\$28,576	\$25,000	\$3,576
61	6230	Maintenance - Vehicle	\$2,114		\$2,114
62	6310	Postage	\$3,615	\$1,088	\$2,529
63	6320	Printing	\$8,527	\$2,366	\$6,161
64	6410	Transportation - Meals	\$6,410		\$6,410
65	6510	Transportation - Staff	\$52,745	\$20,754	\$31,991
68	6530	Transportation - Volunteer	\$6,808		\$6,808
67	6540	Transportation - Conference	\$1,065		\$1,065
68	6560	Field Trips	\$700	\$700	
69	6600	Contract Services	\$147,061	\$137,273	\$9,788
70	6610	Contract Labor	\$11,255	\$11,255	
71	6620	Legal Costs	\$268	\$268	
72	6680	Debt Collection Expense	\$43	\$43	
74	6710	Volunteer Awards	\$2,744	\$200	\$2,544
75	6720	Staff/Older Worker Train.	\$12,623	\$5,488	\$7,135
76	6730	Medical Exams	\$1,100	\$300	\$800
77	6800	Subscriptions	\$580	\$250	\$330
79	6840	Media	\$13,000	\$13,000	
80	6850	Dues/Fees/Misc.	\$12,382	\$5,882	\$6,500
81	6910	Plant Material	\$1,600	\$1,600	
82	7010	Comprehensive Insur.	\$28,043	\$25,077	\$2,966
83	7220	Interest on Loans	\$34,215	\$34,215	
84	8010	Activity Supplies	\$1,690	\$515	\$1,175
85	6780	Advertising	\$4,600	\$4,600	
86	9800	VFT Planner Cost			
87	9810	Allocated Fund Raising Cost	\$187,091	\$64,800	\$122,290
88	9820	Allocated Marketing Cost	\$173,482	\$67,748	\$105,734
89	9900	Allocated Indirect Costs	\$593,017	\$317,965	\$275,052
90		<b>Total Expenditures</b>	<b>\$5,319,476</b>	<b>\$2,887,576</b>	<b>\$2,431,899</b>
91		<b>Surplus/(Deficit)</b>	<b>\$341</b>	<b>\$343</b>	<b>(\$2)</b>

# Jefferson Area Board for Aging Revenue & Expense Report As of September 30, 2013

Annual Budget	Period to Date			Description	Year to Date		
	Actual	Budget	Variance		Actual	Budget	Variance
<b>Revenues</b>							
\$510,286.00	\$45,108.00	\$42,524.05	\$465,178.00	FEDERAL REVENUES	\$448,525.04	\$510,286.00	(\$61,760.96)
\$284,726.00	\$1,153.00	\$23,727.34	\$283,573.00	TITLE III B REVENUES	\$268,274.05	\$284,726.00	(\$16,451.95)
\$101,351.00	\$3,941.00	\$8,445.98	\$97,410.00	STATE REVENUES	\$69,497.99	\$101,351.00	(\$31,853.01)
\$0.00	\$0.00	\$0.00	\$0.00	OPTIONS COUNSELING -	\$75.00	\$0.00	\$75.00
\$1,048,908.00	\$87,964.57	\$87,409.25	\$960,943.43	LOCAL REVENUES	\$1,043,291.50	\$1,048,908.00	(\$5,616.50)
\$567,617.00	\$18,637.00	\$47,301.75	\$548,980.00	FUNDRAISING REVENUE - A	\$327,101.96	\$567,617.00	(\$240,515.04)
\$0.00	\$0.00	\$0.00	\$0.00	PLEDGE REVENUE	\$35,945.00	\$0.00	\$35,945.00
\$695,004.00	\$98,073.24	\$57,917.10	\$596,930.76	CLIENT FEE REVENUE	\$1,192,485.35	\$695,004.00	\$497,481.35
\$15,005.00	\$1,443.23	\$1,250.45	\$13,561.77	PARTICIPANT	\$17,376.74	\$15,005.00	\$2,371.74
\$226,783.00	\$10,539.00	\$18,690.32	\$216,244.00	FOUNDATION/GRANT REVE	\$112,076.30	\$226,783.00	(\$114,706.70)
\$0.00	\$49,363.75	\$0.00	(\$49,363.75)	IN KIND MATCH REVENUE	\$131,022.57	\$0.00	\$131,022.57
\$5,001.00	\$778.00	\$416.78	\$4,223.00	JABA REVENUE TRANSFERS	\$0.00	\$5,001.00	(\$5,001.00)
\$0.00	\$2,750.00	\$0.00	(\$2,750.00)	MISCELLAENOUS REVENUE	\$114,556.02	\$0.00	\$114,556.02
\$0.00	\$0.00	\$0.00	\$0.00	FARMER MKT-DEBIT SWIPE	\$814.00	\$0.00	\$814.00
\$0.00	\$0.00	\$0.00	\$0.00	FARMERS MKT: SLOT FEE R	\$6,693.79	\$0.00	\$6,693.79
\$409,716.00	\$33,352.51	\$34,143.03	\$376,363.49	RENTAL REVENUE	\$409,793.06	\$409,716.00	\$77.06
\$39,755.00	\$3,313.00	\$3,312.93	\$36,442.00	GEN. ASSEM.-SP.	\$39,754.00	\$39,755.00	(\$1.00)
\$108,565.00	\$0.00	\$9,047.12	\$108,565.00	GEN. ASSEM.-COMM. BASED	\$108,565.00	\$108,565.00	\$0.00
\$140,837.00	\$5,966.00	\$11,736.46	\$134,871.00	GEN. ASSEM.-HOME DELIVE	\$140,837.00	\$140,837.00	\$0.00
\$22,174.00	\$423.99	\$1,847.90	\$21,750.01	TITLE III MATCHING FUNDS	\$21,400.02	\$22,174.00	(\$773.98)
\$92,810.00	\$10.32	\$7,734.34	\$92,799.68	INTEREST EARNED	\$328.29	\$92,810.00	(\$92,481.71)
\$0.00	\$3,895.01	\$0.00	(\$3,895.01)	GF Census Adjustment	\$35,971.96	\$0.00	\$35,971.96
\$77,526.00	\$7,715.16	\$6,460.59	\$69,810.84	U.S.D.A. REVENUE	\$81,586.76	\$77,526.00	\$4,060.76
\$5,800.00	\$0.00	\$483.34	\$5,800.00	FEMA REVENUE	\$500.00	\$5,800.00	(\$5,300.00)
\$224,865.00	\$29,248.19	\$18,738.80	\$195,616.81	MEDICAID SERVICES	\$279,512.40	\$224,865.00	\$54,647.40
\$0.00	(\$778.00)	\$0.00	\$778.00	JABA INC. REVENUE	\$0.00	\$0.00	\$0.00
\$0.00	\$8,705.69	\$0.00	(\$8,705.69)	INTEREST REVENUE	\$8,742.29	\$0.00	\$8,742.29
\$0.00	\$168.00	\$0.00	(\$168.00)	UNITED WAY ACC	\$5,684.00	\$0.00	\$5,684.00
\$134,894.00	\$23,856.54	\$11,241.20	\$111,037.46	CONTRACT REVENUE	\$305,977.51	\$134,894.00	\$171,083.51
\$5,000.00	\$0.00	\$416.67	\$5,000.00	COMYN HALL FUNDS	\$0.00	\$5,000.00	(\$5,000.00)
\$0.00	\$0.00	\$0.00	\$0.00	CONSIGNMENT SALE	\$29.75	\$0.00	\$29.75
\$0.00	\$0.00	\$0.00	\$0.00	CONSIGNMENT COMMISSO	\$5.25	\$0.00	\$5.25
(\$89,831.00)	(\$7,695.77)	(\$7,485.91)	(\$82,135.23)	RENTAL SUBSIDY-CONTRA	(\$92,349.24)	(\$89,831.00)	(\$2,518.24)
\$0.00	\$46,017.99	\$0.00	(\$46,017.99)	GAIN ON SALE OF SECURITI	\$46,017.99	\$0.00	\$46,017.99
\$12,796.00	\$517.70	\$1,066.40	\$12,278.30	UNITED WAY DESIGNATED	\$8,863.08	\$12,796.00	(\$3,932.92)
\$0.00	\$0.00	\$0.00	\$0.00	United Way Designated - Revenu	\$0.00	\$0.00	\$0.00
\$62,206.00	\$15,554.00	\$5,183.85	\$46,652.00	VDA CARE COORDINATION	\$62,215.00	\$62,206.00	\$9.00
\$15,102.00	\$1,061.00	\$1,258.52	\$14,041.00	GEN. ASSEM.-LT CARE	\$15,211.96	\$15,102.00	\$109.96
\$0.00	(\$85,571.03)	\$0.00	\$85,571.03	UNREALIZED GAIN/ <LOSSE	(\$85,571.03)	\$0.00	(\$85,571.03)
\$90,261.00	\$0.00	\$7,521.76	\$90,261.00	TITLE III E REVENUE	\$85,857.97	\$90,261.00	(\$4,403.03)
\$385,480.00	\$19,158.60	\$32,123.34	\$366,321.40	KITCHEN: PREPARED MEAL	\$214,729.20	\$385,480.00	(\$170,750.80)
\$0.00	\$1,340.50	\$0.00	(\$1,340.50)	KITCHEN: CATERING - IN	\$16,283.16	\$0.00	\$16,283.16
\$0.00	\$5,214.00	\$0.00	(\$5,214.00)	KITCHEN: CATERING - OUTS	\$26,304.27	\$0.00	\$26,304.27

# Jefferson Area Board for Aging Revenue & Expense Report As of September 30, 2013

Annual Budget	Period to Date			Description	Year to Date		
	Actual	Budget	Variance		Actual	Budget	Variance
\$0.00	\$267.57	\$0.00	(\$267.57)	BEVERAGE EXPENSE	\$3,829.99	\$0.00	\$3,829.99
\$0.00	\$0.00	\$0.00	\$0.00	CATERING MEAL EXPENSE	\$566.42	\$0.00	\$566.42
\$0.00	\$0.00	\$0.00	\$0.00	LOCAL PRODUCE	\$934.94	\$0.00	\$934.94
\$0.00	\$0.00	\$0.00	\$0.00	LOSS: DAMAGED FOOD PRO	\$17.17	\$0.00	\$17.17
\$0.00	\$0.00	\$0.00	\$0.00	MEALS - INVENTORY LOSS	\$18.40	\$0.00	\$18.40
(\$92,414.00)	(\$7,695.77)	(\$7,700.88)	(\$84,718.23)	RENTAL SUBSIDY	(\$84,849.27)	(\$92,414.00)	\$7,564.73
\$499,449.00	\$42,303.45	\$41,621.24	\$457,145.55	RENT EXPENSE	\$503,423.86	\$499,449.00	\$3,974.86
\$0.00	\$0.00	\$0.00	\$0.00	RENT-MTG RM/EXHIBIT SPA	\$130.09	\$0.00	\$130.09
\$0.00	\$194.91	\$0.00	(\$194.91)	UTILITIES - BOTTLED WATE	\$2,717.15	\$0.00	\$2,717.15
\$51,989.00	\$3,089.09	\$4,332.82	\$48,899.91	TELEPHONE / INTERNET	\$59,379.17	\$51,989.00	\$7,390.17
\$10,837.00	\$84.39	\$903.09	\$10,752.61	UTILITIES - GAS	\$5,889.54	\$10,837.00	(\$4,947.46)
\$52,177.00	\$3,227.21	\$4,348.15	\$48,949.79	UTILITIES - ELECTRIC	\$31,004.23	\$52,177.00	(\$21,172.77)
\$0.00	\$625.95	\$0.00	(\$625.95)	UTILITIES - WATER	\$4,978.84	\$0.00	\$4,978.84
\$0.00	\$0.00	\$0.00	\$0.00	MARKETING - SPECIAL EVE	\$325.00	\$0.00	\$325.00
\$1,175.00	\$184.07	\$97.92	\$990.93	SUPPLIES - ACTIVITY	\$1,565.28	\$1,175.00	\$390.28
\$21,493.00	\$1,864.64	\$1,791.46	\$19,628.36	OFFICE SUPPLIES	\$23,480.71	\$21,493.00	\$1,987.71
\$32,588.00	\$7,084.76	\$2,715.96	\$25,503.24	SUPPLIES - PROGRAM	\$70,738.59	\$32,588.00	\$38,150.59
\$0.00	\$0.00	\$0.00	\$0.00	SUPPLIES-MWCC MOVE IN E	\$2,290.36	\$0.00	\$2,290.36
\$10,015.00	\$1,706.47	\$834.66	\$8,308.53	SUPPLIES - MEDICAL	\$4,211.46	\$10,015.00	(\$5,803.54)
\$6,317.00	\$413.17	\$526.43	\$5,903.83	SUPPLIES - CUSTODIAL	\$3,473.99	\$6,317.00	(\$2,843.01)
\$24,908.00	\$2,573.20	\$2,042.41	\$22,334.80	EQUIPMENT - OFFICE	\$20,226.13	\$24,908.00	(\$4,681.87)
\$13,628.00	\$1,320.56	\$1,135.72	\$12,307.44	EQUIPMENT - PROGRAM	\$23,232.58	\$13,628.00	\$9,604.58
\$0.00	\$1,470.51	\$0.00	(\$1,470.51)	EQUIPMENT RENTAL	\$7,401.65	\$0.00	\$7,401.65
\$23,672.00	\$8,164.93	\$1,972.90	\$15,507.07	MAINTENANCE - EQUIPMEN	\$37,388.66	\$23,672.00	\$13,716.66
\$28,576.00	\$1,693.99	\$2,381.37	\$26,882.01	MAINTENANCE - OFFICE/C	\$50,646.55	\$28,576.00	\$22,070.55
\$4,027.00	\$317.63	\$335.60	\$3,709.37	MAINTENANCE - VEHICLE	\$13,122.22	\$4,027.00	\$9,095.22
\$0.00	\$0.00	\$0.00	\$0.00	STORAGE RENTAL	\$1,755.00	\$0.00	\$1,755.00
\$8,894.00	\$329.39	\$741.48	\$8,564.61	POSTAGE	\$9,602.30	\$8,894.00	\$708.30
\$14,733.00	\$41.23	\$1,228.10	\$14,691.77	PRINTING	\$12,067.33	\$14,733.00	(\$2,665.67)
\$6,410.00	\$644.57	\$534.18	\$5,765.43	TRANSPORTATION - MEALS	\$9,675.82	\$6,410.00	\$3,265.82
\$0.00	\$0.00	\$0.00	\$0.00	TRAVEL - MEALS	\$68.59	\$0.00	\$68.59
\$63,436.00	\$4,563.87	\$5,286.66	\$58,872.13	STAFF TRAVEL - LOCAL	\$45,492.44	\$63,436.00	(\$17,943.56)
\$0.00	\$0.00	\$0.00	\$0.00	TRAVEL - CONTRACTOR	\$120.71	\$0.00	\$120.71
\$0.00	\$0.00	\$0.00	\$0.00	LONG DISTANCE TRAVEL	\$2,652.74	\$0.00	\$2,652.74
\$8,129.00	\$493.75	\$677.46	\$7,635.25	VOLUNTEER TRAVEL	\$6,057.90	\$8,129.00	(\$2,071.10)
\$2,046.00	\$1,550.60	\$170.54	\$495.40	CONFERENCE TRAVEL	\$7,680.23	\$2,046.00	\$5,634.23
\$0.00	\$62.18	\$0.00	(\$62.18)	TRAVEL - JABA VEHICLE US	\$62.18	\$0.00	\$62.18
\$1,200.00	\$59.67	\$100.03	\$1,140.33	FIELD TRIPS	\$580.37	\$1,200.00	(\$619.63)
\$200,228.00	\$2,634.46	\$16,685.78	\$197,593.54	CONTRACT SERVICES	\$133,432.04	\$200,228.00	(\$66,795.96)
\$0.00	\$0.00	\$0.00	\$0.00	CONTRACT SVS: FEASIBIL	\$3,500.00	\$0.00	\$3,500.00
\$10,255.00	\$910.00	\$854.59	\$9,345.00	CONTRACT LABOR	\$4,767.00	\$10,255.00	(\$5,488.00)
\$0.00	\$0.00	\$0.00	\$0.00	CONTRACTOR - TELEPHONE	\$444.17	\$0.00	\$444.17
\$800.00	\$0.00	\$66.67	\$800.00	STIPENDS EXPENSE	\$7,800.00	\$800.00	\$7,000.00
\$5,268.00	\$3,325.00	\$439.01	\$1,943.00	LEGAL COSTS	\$5,607.18	\$5,268.00	\$339.18
\$0.00	\$0.00	\$0.00	\$0.00	AUDIT	\$17,750.00	\$0.00	\$17,750.00

**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 to any question in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21	237,593	237,593		
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	148,661	52,214	57,489	38,958
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	69,844	18,346	28,064	23,434
7 Other salaries and wages	1,480,331	1,372,830	107,501	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	313,506	265,106	40,316	8,084
10 Payroll taxes				
11 Fees for services (non-employees):				
a Management				
b Legal	15,502	810	14,692	
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	24,440	24,382		58
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	112,782	95,552	10,023	7,207
12 Advertising and promotion	27,740	22,378	5,362	
13 Office expenses	134,339	112,623	20,609	1,107
14 Information technology				
15 Royalties				
16 Occupancy	110,913	102,593	7,107	1,213
17 Travel	31,400	25,133	5,981	286
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	19,891	17,238	2,653	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	135,985	135,985		
23 Insurance	34,814	15,612	19,202	
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 Meal Costs	329,948	325,126	4,321	501
b Maintenance	88,040	74,112	13,928	
c Noncash program expenses	49,712	49,712		
d Miscellaneous	44,692	36,226	7,590	876
e All other expenses	34,869	23,999	10,248	622
25 Total functional expenses. Add lines 1 through 24e	3,445,002	3,007,570	355,086	82,346
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)				

Internal Revenue Service  
District Director

MAY 02 1988

Department of the Treasury

31 HOPKINS PLAZA  
BALTIMORE, MD 21201

Date: APR 26 1988

Employer Identification Number:  
54-0990078

Contact Person:  
MR. MICHAEL BLITZ

Contact Telephone Number:  
(301) 962-9423

JEFFERSON AREA BOARD FOR AGING INC  
423 LEXINGTON AVENUE  
CHARLOTTESVILLE, VA 22901

Our Letter Dated:  
May 28 1986

Caveat Applies:  
no

Dear Applicant

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 509(a)(1) and 170(b)(1)(A)(vi). Your exempt status under Code section 501(c)(3) is still in effect.

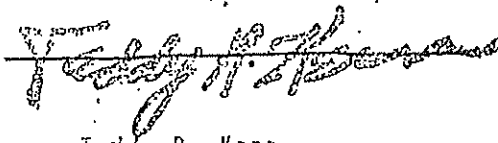
Grantors and contributors may rely on this determination until the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of such status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(1) organization.

If the heading of this letter indicates that a caveat applies, the caveat below or on the enclosure is an integral part of this letter.

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

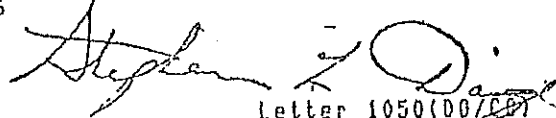
If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



~~Teddy R. Kern~~  
District Director

Acting



Letter 1050(DO/CS)



# The Community Foundation

Serving the Counties of Riverside and San Bernardino

## S. L. Gimbel Foundation Fund

December 5, 2014

### BOARD OF DIRECTORS

James Cuevas  
Chair of the Board

Philip Savage IV  
Vice Chair of the Board

Pat Spafford, CPA  
Chief Financial Officer

Sean Varner  
Secretary of the Board

Glenda Bayless

Dr. Paulette Brown-Hinds

Sergio Bohon

Rabbi Hillel Cohn

Andrea Dutton

Robert Fey

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Patrick O'Reilly

Rose Salgado

Beverly Stephenson

Grover Trask  
Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms. Marta Keane  
Chief Executive Officer  
Jefferson Area Board for Aging, Inc.  
674 Hillsdale Dr. Suite 9  
Charlottesville, VA 22901

Dear Ms. Keane:

Congratulations! A grant has been approved for **Jefferson Area Board for Aging, Inc.** in the amount of **\$23,250** from the S.L. Gimbel Foundation. The **performance period for this grant is December 1, 2014 to November 30, 2015.** Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

***Long-Term Care Ombudsman Program: Build the capacity of JABA's Long-Term Care Ombudsman Program through the addition of Volunteer Ombudsmen.***

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 December 15, 2015** 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

21153 Jefferson Area Board for Aging, Inc.

20140820

GIMB4.2



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



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**2014 S.L. Gimbel Foundation Fund**

**Grant Agreement**

**Organization:** Jefferson Area Board for Aging, Inc.  
**Grant Amount:** \$ 23,250 **Grant Number:** 20140820  
**Grant Period:** December 1, 2014 to November 30, 2015 (Evaluations due December 15, 2015)  
**Purpose:** Long-Term Care Ombudsman Program: Build the capacity of JABA's Long-Term Care Ombudsman Program through the addition of Volunteer Ombudsmen.

**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.**

Marta M. Keane  
Signature

12/9/14  
Date

Marta M. Keane  
Printed Name

CEO  
Title

Organization: 21153 Jefferson Area Board for Aging, Inc.  
Grant Number: 20140820

dc  
12/14/14



The  
Community  
Foundation

Serving the Counties of Riverside and San Bernardino

*S. L. Gimbel Foundation Fund*

BOARD OF DIRECTORS

December 16, 2014

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Chair of the Board

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Immediate Past Board Chair

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms. Marta Keane  
Chief Executive Officer  
Jefferson Area Board for Aging, Inc.  
674 Hillsdale Dr. Suite 9  
Charlottesville, VA 22901

Dear Ms. Keane:

The Community Foundation is pleased to enclose a grant check for **\$23,250** 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 December 15, 2015 and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

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

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

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

20140820

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GIMB4.2



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



HOLD TO LIGHT TO VIEW WATERMARK IN PAPER. HEAT SENSITIVE RED IMAGE DISAPPEARS WITH HEAT. DETECTION CIRCLE REVEALS A LOCK WHEN TESTED.

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**The Community Foundation**

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

**CITIZENS BUSINESS BANK**  
A Financial Services Company  
3695 Main Street, Riverside, CA 92501  
90-3414-1222

Check Fraud Protection for Business

PAY \* Twenty-Three Thousand Two Hundred Fifty and no/100 \*  
DATE

AMOUNT  
\$\*\*\*\*23,250.00

TO THE ORDER OF

12/05/2014

Jefferson Area Board for Aging, Inc.  
674 Hillside Dr. Suite 9  
Charlottesville, VA 22901



*Jonathan Lanza Yuba*  
*Celia Andramate*  
AUTHORIZED SIGNATURE

Security features. Details on back.

⑈038468⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

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21153 Jefferson Area Board for Aging, Inc.

12/05/2014 038468

20140820 12/04/2014 Long-Term Care Ombudsman Program  
GIMB S.L. Gimbel Foundation Advised Fund

23,250.00  
23,250.00

CHECK TOTAL: \$\*\*\*\*23,250.00

The Community Foundation

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