



2014 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:
Grant: 20140868

Organization / Agency Information

Organization/Agency Name: Jewish Family Service of Orange County, Inc.		
Physical Address: 720 Route 17M	City/State/Zip: Middletown, New York 10940	
Mailing Address: 720 Route 17M	City/State/Zip: Middletown, New York 10940	
CEO or Director: Elise Gold	Title: Executive Director	
Phone: (845) 341-1173	Fax: (845) 342-6436	Email: egold@JFSorange.org
Contact Person: Elise Gold		
Title: Executive Director		
Phone: (845) 341-1173 ext. 302	Fax: (845) 342-6436	Email: egold@JFSorange.org
Web Site Address: www.JFSorange.org		Tax ID: 14-1731791

Program / Grant Information

Interest Area: *Health

Program / Project Name: Friendly Visitor Program		
Amount of Grant Requested: \$20,000	Total Organization Budget: \$703,370	Percentage of Organization's Total Budget used for Administration: 14%
Purpose of Grant Request (one sentence): Funds will be used to offer supports to elderly people living at home who do not have effective care and support from family and friends.		
Gimbel Grants Received: List Year(s) and Award Amount(s) 0		

Signatures

Board President / Chair: (Print name and Title) Cynthia Weintraub president	Signature: <i>Cynthia Weintraub</i>	Date: July 28, 2014
Executive Director/President: (Print name and Title) Elise Gold Executive Director	Signature: <i>Elise Gold</i>	Date: July 29, 2014

#6: Jewish Family Service of Orange County, Inc.

Trustees' Comments:

Resubmit Can we be more clear about the religious affiliation or a statement of nondiscrimination or a percentage of population types served? We have asked this of other organizations.

Response:

1. The target population at JFS is not limited to those of Jewish faith. "Our doors are open to the entire community" is our tagline. We certainly live by this motto! The mission, as stated in our application is: "Jewish Family Service empowers **all** people facing challenging times to live with dignity, hope and strength." Whenever I say our mission aloud, I always am sure to emphasize the word "all", as your question is a common one. The agency was started with Jewish values of helping others and making the world a better place. Less than 10% of people served by JFS Orange are Jewish.

2. I am pleased to offer you the following breakdown in percentages of the populations served by our agency as a whole:

Caucasian	83%
Africa, Black American	11%
Native American	.04%
Asian/ Pacific American	.2%
Latino(a)	6%
LGBT (self-identified)	.06%
Persons with disabilities	100%
Persons aged under 30	11%
Persons aged 30-60 years about	14%
Persons aged over 60 about	75%

Elise Gold, LMSW
Executive Director
Jewish Family Service of Orange County
720 Route 17M
Middletown, NY 10940
(845)341-1173 ext.302
(845) 342-6436 - fax

2014 S.L. Gimbel Foundation Fund APPLICATION Narrative

I. Organization Background; Target Population:

A) What is the history, mission and/or purpose of your organization? How long has the organization been providing programs and services to the community?

“Empowering all people facing challenging times to live with dignity, hope and strength” is the mission of Jewish Family Service (JFS). We are a provider of human services that helps people connect with the greater community and available resources. We educate people about services that they may not be aware of; we offer support and provide meaningful tools. The agency was established in 1984; its signature program, the Friendly Visitor Program began in 1985. The Friendly Visitor Program of JFS serves the elderly population; the focus is on residents who have no effective support, or whose support is in jeopardy given the stresses that their caregivers carry.

B) What are some of your past organizational accomplishments (last three years)?

JFS Orange has realized the following accomplishments during the last three years:

- Partnerships have been made with four municipalities throughout Orange County. Through these partnerships, our trained volunteers can assist more elderly people within their communities
- A partnership was established between JFS and the St. Luke’s Cornwall Hospital. Through the “Here 4 You” program, JFS organizes volunteers to drive residents to their cancer treatments
- A strong relationship has been forged with the local Cornell Cooperative Extension. A United Way grant helped to solidify this collaboration; we refer clients to one another, offering services to clients and educating them in areas of gaining better financial footing.
- In 2012, JFS Orange was recognized as a “Pillar of the Community” by the Greater Hudson Valley Family Health Center

C) What are your key programs and activities? Describe the communities you serve. Include populations, geographic locations served, and relevant statistics.

Orange County, NY is 60 miles north of NYC. The region has much rural land, some suburban areas and three cities. Many of the communities are quite isolated; there is practically no public transportation accessible throughout the county. In Orange County, over 1/3 of the people who are 60 years old live alone. The rate goes up as people get older. The focus of this grant application is addressing the needs of the Friendly Visitor Program. This program currently serves over 425 older adults who have no other means to gain access to resources and services. Details about the services will be outlined in another section.

Aside from the Friendly Visitor Program, a few of the programs that Jewish Family Service of Orange County offers are listed below:

- Our Medicaid Service Coordination Program addresses the needs of 80 people with developmental disabilities. Service Coordinators advocate for the individuals and help them with community involvement.
- The Diane Finkelstein for Families in Crisis Fund helps those who are facing financial struggles. Over 50 families gained financial support through this fund last year. Helping them receive financial support during a critical time made it possible to get back on their feet.
- Our Teen Mission Program helped youth who are marginalized, with a focus on the LGBT population. About 80 students participated in organizing a conference and other social events.

- The Yeladeinu Program (“Our Children”) serves about 50 children with special needs. We offer opportunities for socialization, education and recreation for both the children and their families. The families and children have a greater sense of inclusion because of this program.
- Counseling for people who are homebound is offered by a licensed social worker.
- Case management services help connect older adults connect to resources.

II. Project Information:

- A) Statement of Need: One third of people 60 years of age in Orange County live alone. This percentage increases as people age. Many of the people have no supports. Living alone can lead to isolation and depression. For those that do have supports, the caregivers often are stressed in their role; this stress can create illness among the caregivers. When illness strikes, there is no care at all for the loved one in need.
- B) Project Goal, Objectives and Methodology: The goal of the Friendly Visitor Program is to help older adults continue living in their homes in the absence of caregivers. JFS coordinates 275 volunteers to connect older adults to the community. Volunteers drive the elderly to medical appointments, do grocery shopping for them, and visit them weekly as well as make reassuring phone calls. Background checks are performed on volunteers; they are involved in a comprehensive agency-led training. Individuals in need of services have a thorough home assessment conducted by professional staff. There is no other agency within Orange County that offers such services.

Objective I: Eleven hundred (1,100) trips to medical appointments and other necessary errands will be provided to 190 elderly people living at home during the course of the year. Activities: The transportation coordinator will call volunteers to make arrangements. Volunteers will bring the individuals to their destinations. The volunteer will wait with them in the waiting room during medical appointments.

Objective II: During a one year period, 1650 trips to grocery stores will be made for 130 elderly people at home. Activities: Friendly Visitor Coordinators will make matches between our pool of volunteers and people in need of groceries who are otherwise homebound. At times, the volunteers will shop on their own according to the list the elderly person provides. Other times, the volunteer will drive and accompany the elderly people in need to the grocery stores.

Objective III: During the course of a year, 130 elderly people that are isolated will receive at least 20 visits each by volunteers, totaling a minimum of 2600 visits. Activities: Since the Friendly Visitor Coordinators have a keen sense of needs of the people we serve (in depth assessments are conducted) and an understanding of the gifts of the individual volunteers, they make appropriate matches between the pool of volunteers and the elderly people who live alone at home. They coordinate the visits of the volunteers to the elderly who are living at home. During the visits, volunteers may read books to the elderly, they may play games or talk about the news or other topics of interest to the people we serve.

The Friendly Visitor Program has been an established program of JFS Orange County. The program is ongoing. Currently, about 425 elderly people are served through the Friendly Visitor Program. With additional funding, we can serve more people in need as listed above. Please refer to the objectives above that include specifics regarding activities and number of participants served. There are no other programs that offer these services throughout this community. The local Office for the Aging offers a few similar services; there is one critical difference. That agency only offers services if there is a caregiver in the picture. Many other agencies refer people to us. They include Adult Protective Services, Department of Social Services, Office for the Aging and other nonprofit organizations. We are also

community partners with several municipalities. We train their volunteers and offer ongoing supports to the local municipalities. Volunteers are at the core of the program. If it were not for the 300 active volunteers, the program would not survive.

- C) **Project Outcomes and Evaluation:** The key anticipated outcome is that a greater number of older adults will age in place. Services that we offer make it possible for people to live at their homes. Living in a residence of choice (their home) has a huge impact on the people served. Without this program, people would have to turn to living in congregate care situations such as assisted living and nursing homes. Having a better quality of life for those that will be able to continue living in their home is the impact that the project has on the participants. Secondary outcomes involve the impact the program has on the volunteers and loved ones who live far away. Volunteers reap many rewards, knowing that they are making a difference. Loved ones of the elderly can have peace of mind, knowing that their elderly family member is getting needed supports from JFS.

On a monthly basis, we make phone calls to people who receive our services. We ask them about the services received. The volunteers too, report the services they offer. We track the outcomes and will track the progress based on information gleaned from the monthly phone call surveys and volunteer reports.

- D) **How will the grant funds be used?** Currently, we have an agreement with the county's Office for the Aging (OFA). OFA funds about 60% of the program. We are seeking funds from the S.L. Gimbel Foundation to help support the gap in funding. Monies will be used for paying our Program Director, Friendly Visitor Coordinators, Transportation Coordinator, and Outreach Coordinator. Other program costs include office rental, phone bills, travel reimbursement (for recruitment and in home assessments), outreach and training equipment, and other agency overhead. The outreach and training equipment will be used to help promote and ultimately grow the program.

III. Project Future

The agency is working towards growing the Friendly Visitor Program. We are in a situation where we have a waiting list of people who would like our services. In order to meet their needs, volunteer recruitment and training are needed. This is the role of the Outreach Coordinator. With more funding, her hours can be expanded to increase the pool of volunteers. In addition, our Friendly Visitor Coordinator and Case Management Staff can do more in home assessments. This opens the door to offering more people services. JFS has established partnerships with four municipalities. With these partnerships, the trained volunteers tend to "buy in" more, as they are serving their neighbors. This recently has helped with the program's growth. With additional funds, our goal is to forge relationships with other municipalities throughout Orange County. The Friendly Visitor Program would be able to meet the needs of more people who choose to age in place.

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

The active Board of Directors meets monthly. They receive regular reports on the program. Some of them have been Friendly Visitor volunteers themselves in the past, or know and have referred elderly people in the community needed services. To this end, they are key stakeholders. The Board is comprised of educators, doctors, accountants and health and human service professionals (and retirees). The Executive Director is a Licensed Social Worker who has worked for 22 years in the field of human services in Orange County. The Program Director of the Friendly Visitor Program has worked for the agency for over 25 years. She has built the program to what it is today. Staff within the program holds a Bachelor's Degree in Human Services.

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
Volunteer Training & Outreach Coordinator	\$16 x 14 hrs x 52 Fringe at 10%		\$ 6,407	\$ 5,824 \$ 582	\$11,648 \$ 1,165
Program Coordinator	\$16 x 36 x 52 Fringe at 10%		\$28,371	\$ 4,160 \$ 416	\$29,952 \$ 2,995
Program Director	\$25 x 37.5 x 52		\$49,335	\$ 3,900 \$ 390	\$48,750 \$ 4,875
Travel/Mileage	6250 miles x .56 cents		\$ 2,504	\$ 996	\$ 3,500
Outreach Display Equipment	2 printed runners with JFS logo at \$210 each			\$ 420	\$ 420
Outreach Display Equipment	2 standard table throws at \$78 each			\$ 156	\$ 156
Outreach Display Equipment	2 Show & Go display boards at \$460 each			\$ 920	\$ 920
Volunteer Training & Outreach Equipment	Laptop Computer			\$ 1,200	\$ 1,200
Volunteer Training & Outreach Equipment	LCD Projector			\$ 800	\$ 800
Volunteer Training & Outreach Equipment	Portable LCD Projector Screen			\$ 236	\$ 236
TOTALS:			\$86,617	\$20,000	\$106,617

Celia Cudiamat

From: Celia Cudiamat
Sent: Tuesday, December 02, 2014 3:11 PM
To: 'egold@JFSorange.org'
Subject: Gimbel Foundation Grant Application

Importance: High

Elise,

Thank you for submitting an application to the Gimbel Foundation grant opportunity.

The review process has taken longer than expected; we thank you for your patience.

At this time, the Trustees (reviewers) are requesting the following information:

- 1) Please confirm that your target population is not limited to those of Jewish faith.
- 2) Please provide a breakdown (percentage) of populations served (i.e. ethnic, age groups, etc.)

Please provide this information via email by December 8, preferably sooner.

Celia

Celia Cudiamat | Executive Vice President of Programs The Community Foundation

CORPORATE OFFICE: 3700 Sixth Street, Suite 200 | Riverside, CA 92501

OFFICE: 951.241.7777 x 114 | **FAX:** 951.684.1911

COACHELLA VALLEY OFFICE: 777 E. Tahquitz Canyon Way, Suite 200-48 | Palm Springs, CA 92262

OFFICE: 760.969.5027 | **FAX:** 760.969.5028

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Strengthening Inland Southern California through philanthropy.



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

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
Keller Shatanoff Foundation	25,000
Orange County Office for the Aging	59,505
Jewish Federation of Greater Orange County	40,000
Local Municipalities	11,500

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Orange & Rockland Utilities	3,500	

VII. Financial Analysis

Agency Name: Jewish Family Service of Orange County, Inc.

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

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

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

Program Expenses	/Total Operating Expenses	= Program Expense Ratio
\$ 554,749 550,076	\$ 659,905 652,419	84%
990: Part IX, Column B, Line 25	990: Part IX, Column A, Line 25	

Administrative Expense (100%-Program Expense ratio) per 990 above	Percentage of Organization's Current Total Budget used for Administration (from cover page)	Differential
16%	14%	2%

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.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$488,942	\$20,612	\$30,403	16.76

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$39,065	\$11,037

Notes: A variety of factors contributed to the difference in excess from 2012 to 2013. The agency realized a higher increase in assets in 2013 due to significant growth of one of the agency's programs, increasing income from client fees substantially.

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	\$39,551	6	Program Fees	\$186,859	27
Fundraising/Special Events	\$36,856	5	Interest Income	\$0	0
Corp/Foundation Grants	\$276,137	39	Other: Federation	\$70,000	10
Government Grants	\$77,574	11	Other: United Way	\$15,281	2

Notes: JFS acknowledges that financial stability is based on a well-rounded source of funding. The leadership of the agency seeks alternative sources of funding on an ongoing basis.

VIII. Application submission check list:

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

Jewish Family Service of Orange County Board of Directors 2014

NAME	ADDRESS
Barbee, Wyletta (Retired- Human Resources) Officer of the board-NAACP Term 2012 - 2015	Middletown, NY 10940
Carrick, William, Treasurer (Accountant) 71 East Main St., Middletown 10940 Term: 2012-2015	Middletown, NY 10940
Cauchard, Tammy (Financial Advocate, ORMC) Term 2011-2014	Otisville, NY 10963
Davis, Janet (Retired School Administrator, Board Member of HONOR ehg) Term 2012-2015	Wurtsboro, NY 12790
Goetz, Gilbert, Past President (Retired- Pharmacist) Term 2012-2015	Monroe, NY 10950
Grossman, Betty, Secretary (Secretary- Landfield Ave. Synagogue) Term 2012-2014	Port Jervis, NY 12771
Mokotoff, Gertrude (Retired- Elected official) Term 2012-2015	Middletown, NY 10940
Pariser, Deb, Vice President (Retired- Human Services) Term 2012-2014	Newburgh, NY 12550
Schindler, Suzanne (Parent Advocate, Board Member of Inspire) Term 2011-2014	Goshen, NY 10924
Solomon Roshko, Arlene (Pediatrician) Term 2013-2015	Slate Hill, NY 10973
Solomon, Ellen (Dentist) Term 2010-2013	Goshen, NY 10924
Weintraub, Cynthia, President (Retired-Teacher, Board Member of People to People) Term 2012-2014	Otisville, NY 10963
Weintraub, Rabbi Philip Term 2014-2017	Congregation Agudas Israel Newburgh, NY 12550
Woronoff, Debbie, Past President (Service Director- Rockland Psych Center, Newburgh Mental Health Clinic) Term 2011-2015	Bloomington, NY 12721

2014 S.L. Gimbel Foundation Fund

	Actuals		Budget		Variance
	2013		2014		
Income					
Individual Contributions & Fundraising	\$ 82,322.00	\$	48,500.00	\$	(33,822.00)
Private & Corporate Support	\$ 276,137.00	\$	302,696.00	\$	26,559.00
Jewish Federation of Orange County	\$ 70,000.00	\$	77,000.00	\$	7,000.00
Government Grants	\$ 77,574.00	\$	101,505.00	\$	23,931.00
Fees	\$ 180,944.00	\$	160,269.00	\$	(20,675.00)
United Way	\$ 15,281.00	\$	13,400.00	\$	(1,881.00)
Total Income	\$ 702,258.00	\$	703,370.00	\$	1,112.00
Expenditures					
Personnel					
Payroll & Fringe - Program Direct	\$ 341,255.00	\$	348,782.00	\$	7,527.00
Payroll & Fringe - Administrative	\$ 125,442.00	\$	131,578.00	\$	6,136.00
Insurance - Health	\$ 11,692.00	\$	12,050.00	\$	358.00
Pension/Staff Appreciation	\$ 7,452.00	\$	5,470.00	\$	(1,982.00)
Total Personnel	\$ 485,841.00	\$	497,880.00	\$	12,039.00
General Program/Administrative					
Aid to Families/Crisis Fund/FEMA	\$ 29,047.00	\$	38,600.00	\$	9,553.00
Audit & Accounting	\$ 6,000.00	\$	6,500.00	\$	500.00
Computer & Website	\$ 3,002.00	\$	9,400.00	\$	6,398.00
Conferences/Meetings/Memberships	\$ 7,266.00	\$	8,400.00	\$	1,134.00
Consultants/Contracted Programs	\$ 4,718.00	\$	8,340.00	\$	3,622.00
Depreciation	\$ 4,150.00			\$	(4,150.00)
Fundraising/Marketing	\$ 12,245.00	\$	15,000.00	\$	2,755.00
Insurance Expense	\$ 11,526.00	\$	5,750.00	\$	(5,776.00)
Mileage	\$ 17,251.00	\$	18,825.00	\$	1,574.00
Miscellaneous/Taxes	\$ 3,205.00	\$	2,250.00	\$	(955.00)
Postage	\$ 4,432.00	\$	4,500.00	\$	68.00
Printing & Publicity	\$ 3,728.00	\$	4,875.00	\$	1,147.00
Professional Fees/Background Checks	\$ 2,015.00	\$	2,200.00	\$	185.00
Rent & Utilities	\$ 45,349.00	\$	47,600.00	\$	2,251.00
Supplies - Office	\$ 5,098.00	\$	5,500.00	\$	402.00
Supplies - Program	\$ 5,431.00	\$	11,550.00	\$	6,119.00
Telephone & Internet	\$ 10,030.00	\$	9,000.00	\$	(1,030.00)
Volunteer Appreciation	\$ 2,858.00	\$	3,000.00	\$	142.00
Total General Program/Administrative	\$ 177,351.00	\$	201,290.00	\$	23,939.00
Total Expenditures	\$ 663,192.00	\$	699,170.00	\$	35,978.00
Revenue Less Expense	\$ 39,066.00	\$	4,200.00	\$	(34,866.00)

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, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
Grants and other assistance to individuals in the U.S. See Part IV, line 22	29,047	29,047		
Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
Benefits paid to or for members				
Compensation of current officers, directors, trustees, and key employees				
Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
Other salaries and wages	425,857	355,828	70,029	
Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
Other employee benefits				
Payroll taxes	58,720	49,279	9,441	
Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	6,000	5,100	900	
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.)	1,860	1,860		
Advertising and promotion	970	951	19	
Office expenses	7,424	6,453	971	
Information technology	5,016	4,800	216	
Royalties				
Occupancy	55,379	47,478	7,901	
Travel	17,251	17,122	129	
Payments of travel or entertainment expenses for any federal, state, or local public officials				
Conferences, conventions, and meetings	4,676	4,249	427	
Interest				
Payments to affiliates				
Depreciation, depletion, and amortization	4,150	3,528	622	
Insurance	10,576	4,854	5,722	
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 Supplies Expense	16,820	12,643	4,177	
b Speakers/Special Programs	2,859	2,859		
c Membership/Dues	2,590	2,249	341	
d Fund Raising	1,297			1,297
e All other expenses	1,927	1,746	181	
Total functional expenses. Add lines 1 through 24e	652,419	550,046	101,076	1,297
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
G.P.O. BOX 1680
BROOKLYN, NY 11202

DEPARTMENT OF THE TREASURY

Date:

SEP 13 1995

JEWISH FAMILY SERVICE OF ORANGE INC
26 DILLON DR W BOX 1453
MIDDLETOWN, NY 10940

Employer Identification Number:
14-1731791

Case Number:
115094042

Contact Person:
JAMES COLEMAN

Contact Telephone Number:
(718) 488-2221

Our Letter Dated:
March 13, 1991

Addendum Applies:
No

Dear Applicant:

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

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. 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 Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless 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, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

You are required to file Form 990 only if your gross receipts each year are normally more than \$25,000. For guidance in determining whether your gross receipts are "normally" more than \$25,000, see the instructions for Form 990. If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$10 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$5,000 or 5 percent of your gross receipts for the year, whichever is less. This penalty may also be charged if a return is not complete, so please be sure your return is complete before you file it.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

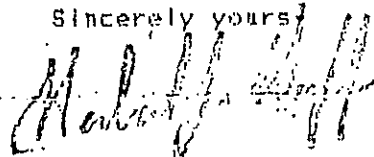
Letter 1050 (00/06)

JEWISH FAMILY SERVICE OF ORANGE INC

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,

A handwritten signature in dark ink, appearing to read "Herbert J. Huff". The signature is written in a cursive style with some loops and flourishes.

Herbert J. Huff
District Director

INTERNAL REVENUE SERVICE
DISTRICT DIRECTOR
G.P.O. BOX 1680
BROOKLYN, NY 11202

DEPARTMENT OF THE TREASURY

Date: MAR 13 1991

JENISH FAMILY SERVICE OF ORANGE
COUNTY INC
C/O ELIZABETH KADESH
360 POWELL AVENUE
NEWBURGH, NY 12550

Employer Identification Number:
14-1731791
Contact Person:
NANCY KENNY
Contact Telephone Number:
(718) 780-6114

Accounting Period Ending:
December 31
Foundation Status Classification:
509(a)(1)
Advance Ruling Period Begins:
5/30/90
Advance Ruling Period Ends:
12/31/94
Addendum Applies:
NO

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably be expected to be a publicly supported organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during an advance ruling period. This advance ruling period begins and ends on the dates shown above.

* Within 90 days after the end of your advance ruling period, you must submit to us information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, you will be classified as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, you will be classified as a private foundation for future periods. Also, if you are classified as a private foundation, you will be treated as a private foundation from the date of your inception for purposes of sections 507(d) and 4940.

Grantors and contributors may rely on the determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you submit the required information within the 90 days, grantors and contributors may continue to rely on the advance determination until the Service

Letter 1045 (DD/CG)

JEWISH FAMILY SERVICE OF ORANGE

makes a final determination of your foundation status.

If notice that you will no longer be treated as a publicly supported organization is published in the Internal Revenue Bulletin, grantors and contributors may not rely on this determination after the date of such publication. In addition, if you lose your status as a publicly supported organization and a grantor or contributor was responsible for, or was aware of, the act or failure to act, that resulted in your loss of such status, that person may not rely on this determination from the date of the act or failure to act. Also, if a grantor or contributor learned that the Service had given notice that you would be removed from classification as a publicly supported organization, then that person may not rely on this determination as of the date such knowledge was acquired.

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. In the case of an amendment to your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, you should inform us of all changes in your name or address.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the private foundation excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes. If you have any questions about excises, employment, or other Federal taxes, please let us know.

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.

Contribution deductions are allowable to donors only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

Contributions to you are deductible by donors beginning 5/30/90.

You are required to file Form 990, Return of Organization Exempt From Income Tax, only if your gross receipts each year are normally more than

JEWISH FAMILY SERVICE OF ORANGE

\$25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$10 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$5,000 or 5 percent of your gross receipts for the year, whichever is less. This penalty may also be charged if a return is not complete, so please be sure your return is complete before you file it.

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

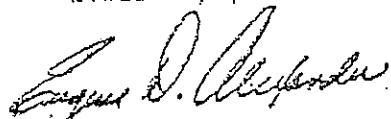
You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours:



Eugene D. Alexander
District Director

Enclosure(s):
Form 872-C



OUR DOORS ARE OPEN TO THE ENTIRE COMMUNITY

January 21, 2015

Celia Cudiamat
Executive Vice President of Programs
The Community Foundation
3700 Sixth Street, Suite 200
Riverside, CA 92501

Dear Ms. Cudiamat,

This letter is filled with gratitude. On behalf of Jewish Family Service, I can whole heartedly express much joy and appreciation in hearing of the decision of the Community Foundation (on behalf of the S.L. Gimbel Foundation Fund) to support the work that our agency does. I am particularly pleased as this door opens a new partnership.

The generous amount of \$20,000 for the 2015 calendar year will have a significant impact on the Friendly Visitor Program. This gift gives us the ability to offer support to elderly people living at home who do not have effective care and support from family and friends. Part of the funds will be applied to our outreach efforts, so that we can help more people in the community.

I have signed the Grant Agreement and kept a copy for our records. I will complete the Grant Evaluation by January 15, 2016. During the course of the year, if you'd like any other stories, photos, or would just like to check in to see and hear of program updates; please don't hesitate to contact us. I've enclosed a copy of our Safety Net Programs brochure. You may find the description of the Friendly Visitor Program of interest.

For those that are receiving services, for the Board of Directors at JFS and for the staff and volunteers who keep our programs going, please share our thanks to the Directors of the Community Foundation and the S. L. Gimbel Foundation for your first time support.

With deep gratitude,

A handwritten signature in cursive script that reads 'Elise Gold'.

Elise Gold
Executive Director



The
Community
Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS

January 13, 2015

Philip Savage IV
Chair of the Board

Ms. Elise Gold
Executive Director

~~Sean Varnor~~
Vice Chair of the Board

Jewish Family Service of Orange County, Inc.
720 Rt. 17M

Pat Spafford, CPA
Chief Financial Officer

Middletown, NY 10940

Sergio Bohon
Secretary of the Board

Dear Ms. Gold:

Glenda Bayless

Congratulations! A grant has been approved for **Jewish Family Service of Orange County, Inc.** in the amount of **\$20,000** from the S.L. Gimbel Foundation. The **performance period for this grant is January 1, 2015 to December 30, 2015.**

Dr. Paulette Brown-Hinds

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:

Rabbi Hillel Cohn

Friendly Visitor Program: Offer support to elderly people living at home who do not have effective care and support from family and friends.

James Cuevas
Immediate Past Board Chair

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.

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Dr. Henry Shannon

Beverly Stephenson

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

Dr. Jonathan Lorenzo Yorba
President and CEO

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

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

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

21353 Jewish Family Service

20140868

GIMB4.3



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

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

2014 S.L. Gimbel Foundation Fund

Grant Agreement

Organization: Jewish Family Service of Orange County, Inc.
Grant Amount: \$ 20,000 **Grant Number:** 20140868
Grant Period: January 1, 2015 to December 30, 2015 (Evaluations due January 15, 2016)
Purpose: Friendly Visitor Program: Offer support to elderly people living at home who do not have effective care and support from family and friends.

1. Use of Grant Funds

Grant funds must be expended within the grant period, for the purpose and objectives described in your grant proposal. Grant funds may not be expended for any other purpose without prior written approval by The Community Foundation. If there are significant difficulties in making use of the funds as specified in your proposal, or if the grant funds cannot be spent within the grant period, notify us in writing promptly.

Formal requests for extensions or variances must be submitted to the Foundation's Board of Directors for approval a minimum of 60 days before the end of the grant period.

Requests for variances or extensions are reviewed on a case-by-case basis and approved by the Board of Directors. If a request is denied, unused funds must be immediately refunded to the Foundation.

2. Payment of Grant Funds

The grant funds will be paid in full by the Foundation upon receipt of the signed Grant Agreement. Challenge grant funds will be paid in full upon receipt of the signed Grant Agreement and upon receipt of documentation providing evidence that condition(s) of the challenge grant has/have been met.

3. Certification and Maintenance of Exempt Organization Status

This grant is specifically conditioned upon Grantee's status as an eligible grantee of The Community Foundation. The Foundation has obtained a copy of the Grantee's IRS determination letter. Grantee confirms that it has not had any change in its tax-exempt status, and shall notify the Foundation immediately of any such change.

4. Final Report and Records

The Grantee will submit the Grant Evaluation report per the deadline set forth in the award letter. This report includes a narrative on outcomes based on goals and objectives set forth in the grant proposal and an expenditure report documenting use of grant funds. If equipment was purchased, copies of receipts need to be included.

5. Grantee's Financial Responsibilities

Grantee will keep records of receipts and expenditures of grant funds and other supporting documentation related to the grant at least four (4) years after completion of the grant and will make such records of receipts, expenditures and supporting documentation available to the Foundation upon request.

6. Publicity

The Community Foundation recommends publicity for the grant and acknowledging The Community Foundation in internal correspondence, brochures as appropriate; newsletters, annual reports and email blasts or e-newsletters.

The credit line of "Made possible in part by a grant from the "S.L. Gimbel Foundation Advised Fund at The Community Foundation – Inland Southern California" is suggested. When your donors are listed in printed materials, include the S.L.

Gimbel Foundation Advised Fund at The Community Foundation in the appropriate contribution size category. When publishing our name, please note the "The" at the beginning of our name is a legal part of our name. It should always be used and capitalized. Attaching our logo is also appreciated. Our logo can be downloaded from our website at www.thecommunityfoundation.net.

7. Indemnification

In the event that a claim of any kind is asserted against the Grantee or the Foundation related to or arising from the project funded by the Grant and a proceeding is brought against the Foundation by reason of such claim, the Grantee, upon written notice from the Foundation, shall, at the Grantee's expense, resist or defend such action or proceeding, at no cost to the Foundation, by counsel approved by the Foundation in writing.

Grantee hereby agrees, to the fullest extent permitted by law, to defend, indemnify, and hold harmless the Foundation, its offices, directors, employees, and agents, from and against any and all claims, liabilities, losses, and expenses (including reasonable attorneys' fees) directly, indirectly, wholly, or partially arising from or in connection with any act or omission by Grantee, its employees, or agents in applying for or accepting the Grant, in expending or applying the Grant funds or in carrying out any project or program supported by the Grant, except to the extent that such claims, liabilities, losses, and expenses arise from or in connection with any bad faith act or omission by the Foundation, its officers, directors, employees, or agent.

8. Termination

The Community Foundation may terminate this agreement, withhold payments, or both at any time, if, in the Community Foundation's judgment: a) The Community Foundation is not satisfied with the quality of the Grantee's progress toward achieving the project goals and objectives; b) the Grantee dissolves or fails to operate; c) the Grantee fails to comply with the terms and conditions of this agreement.

9. Limitation of Support

This Agreement contains the entire agreement between the parties with respect to the Grant and supersedes any previous oral or written understandings or agreements.

I have read and agree to the terms and conditions of the Grant Agreement.

 Elise Gold
Signature

 January 21, 2015
Date

 Elise Gold
Printed Name

 Executive Director
Title

Organization: 21353 Jewish Family Service of Orange County, Inc.
Grant Number: 20140868

EG
 1/28/15



The
Community
Foundation

Serving the Counties of Riverside and San Bernardino

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS

January 30, 2015

Philip Savage IV
Chair of the Board

Sean Varner
Vice Chair of the Board

Pat Spafford, CPA
Chief Financial Officer

Sergio Bohon
Secretary of the Board

Glenda Bayless

Dr. Paulette Brown-Hinds

Rabbi Hillel Cohn

James Cuevas
Immediate Past Board Chair

Paul Granillo

Stanley Grube

Kirk Harns

Dr. Fred Jandt

Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Dr. Henry Shannon

Beverly Stephenson

Dr. Jonathan Lorenzo Yorba
President and CEO

Ms. Elise Gold
Jewish Family Service of Orange County, Inc.
720 Rt. 17M
Middletown, NY 10940

Dear Ms. Gold:

The Community Foundation is pleased to enclose a grant check for **\$20,000** from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned. The completed Grant Evaluation form is due by January 15, 2016 and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

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

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

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

20140868

38669

GIMB4.2



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

The Community Foundation

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

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

38669

PAY * Twenty Thousand and no/100 *

TO THE ORDER OF

DATE

AMOUNT

12/31/2014

\$****20,000.00

Jewish Family Service of Orange County, Inc.
720 Rt. 17M
Middletown, NY 10940



Celia Andriamat
Jonathan Lorenzo York
AUTHORIZED SIGNATURE

Security features. Details on back.

⑈038669⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

38669

21353	Jewish Family Service of Orange County, Inc.	12/31/2014	038669	
20140868	01/08/2015 Friendly Visitor Program			20,000.00
GIMB	S.L. Gimbel Foundation Advised Fund			20,000.00

CHECK TOTAL: \$****20,000.00

The Community Foundation

38669

21353	Jewish Family Service of Orange County, Inc.	12/31/2014	038669	
20140868	01/08/2015 Friendly Visitor Program			20,000.00
GIMB	S.L. Gimbel Foundation Advised Fund			20,000.00

CHECK TOTAL: \$****20,000.00