

2015 S.L. Gimbel Foundation Fund APPLICATION

Narrative

Please provide the following information by answering all questions (I to IV) in **THREE (3) typed pages, 12 Font, One Inch Margins**. Please be thorough, clear, specific, and concise.

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?
- B) What are some of your past organizational accomplishments (last three years)?
- C) What are your key programs and activities? Describe the communities you serve. Include populations, geographic locations served, and relevant statistics.

II. Project Information:

- A) Statement of Need
 - 1. Specify the community need you want to address and are seeking funds for.
- B) Project Goal, Objectives and Methodology
 - 1. State your project goal. Describe your project. How does your project meet the community need? What is unique and innovative about this project?
 - 2. State up to three objectives. Objectives should be specific, measurable, action-oriented, realistic, and time-specific. Specify the activities you will undertake to meet each objective. Use the following format for your objectives and respective activities:
 - Objective I:
 - Activities:
 - Objective II:
 - Activities:
 - Objective III:
 - Activities:
 - Provide a timeline for implementing the project?
 - 3. Who will this grant serve? Describe your target population. How many people will be impacted? Provide a breakdown: Number of Children, Youth, Adults, Seniors, Animals. Include a detailed list of activities and number of participants for each activity.
 - 4. How does this project relate to other existing projects in the community? Who else in the community is providing this service or has a similar project? Who are your community partners (if any)? How are you utilizing volunteers?
- C) Project Outcomes and Evaluation
 - 1. What are the key anticipated outcomes of the project and impact on participants?
 - 2. How will you know if you have achieved the expected outcomes?
 - 3. How will progress towards the objectives be tracked and outcomes measured?
- D) How will you use the grant funds?

III. Project Future

- A) Explain how you will support this project after the grant performance period. Include plans for fundraising or increasing financial support designated for the project.

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

- A) Describe your board of directors and the role it plays in the organization. What committees exist within your board of directors? How does the board of directors make decisions?
- B) Describe the qualifications of key personnel/staff responsible for the project.

I. Organizational Background: Target Population

Mizell Senior Center has been serving the greater Palm Springs area for over 40 years, and is the community focal point on healthy and active aging. The Center is a place where Active Seniors come together for services and activities which enhance dignity, support independence, and encourages involvement in and with the community. Programs are designed to meet the needs of low income seniors, to provide opportunities to combat loneliness and isolation, and to maintain active productive lives. Our Meals On Wheels Program has grown from serving approximately 30,000 meals annually to the Greater Palm Springs area to now serving an estimated 120,000 meals annually from Palm Springs to Salton Sea. In addition, we serve over 40,000 congregate meals to low income seniors throughout the Coachella Valley. The mission of Mizell is to enhance the lives and welfare of adults who live in or visit our community. Additional programs are exercise and fall prevention, counseling, health checks, and social/recreational programs. Our flu shot program provides free flu vaccinations to nearly 400 high risk seniors each year.

Mizell Senior Center is a 501(c)(3) nonprofit organization governed by a volunteer Board of Directors consisting of 25 members. The annual budget for fiscal year 2015 – 16 is \$2.575 million dollars. Senior staff consists of an Executive Director, Director of Development and Marketing, Program Director, Director of Administration, Nutrition Director, and Finance Director. Our comprehensive nutrition program consists of both Meals On Wheels delivery and congregate nutrition sites throughout the Coachella Valley. We maintain a fully staffed kitchen, Meals On Wheels Drivers, and outreach workers to conduct this program.

Our Meals On Wheels expansion came about from a contract with the Riverside County Office on Aging (OOA) that provides basic funding for the program. However, the funding is limited and requires "matching funds" from community organizations, individuals, and foundations. The Congregate Nutrition Program is also partially funded through the OOA. The Mizell Meals on Wheels program serves approximately 1/3 of home delivered meals in ALL of Riverside County and is the only such program without a waiting list. In order to maintain current program service levels, we must raise nearly \$200,000 from additional sources.

This proposal is to assist in the maintenance and expansion of both Meals on Wheels and Congregate nutrition services to the most underserved portions of Eastern Riverside County in the City of Coachella and unincorporated areas including Mecca, Thermal and North Shore Salton Sea. Our program is serving the poorest of the poor in these areas. Approximately ten per-cent (10%) of the total population is age 62 and older and most are Hispanic. Many of the older adults receiving home delivered meals live alone and are frail and homebound. The median social security income ranges from approximately \$9,500 per year in the unincorporated areas to \$11,570 in the City of Coachella. (2010 US Census American Fact Finder) Based on a 2006 California-funded economic survey, Coachella ranks as one of the ten poorest cities in the state. Accordingly, there are few if any resources available as a social safety net for frail and homebound seniors. The expanded congregate meal program includes Mecca, Thermal, and Coachella.

II. Project Information

Statement of Need: Mizell Senior Center through a contract with the County of Riverside Office On Aging expanded Meals On Wheels service to the Eastern Coachella Valley and unincorporated areas of Mecca, Thermal, North Shore Salton Sea and the City of Coachella. We have increased service to this area by over 500% from 40 unduplicated clients to 303 unduplicated clients. In the most underserved areas of Coachella, Mecca, Thermal and Salton Sea, we served 85 additional unduplicated clients. Even in Indio and La Quinta, unduplicated clients increased. According to the most recent report of the Health Assessment Resource Center (HARC 2010 Report) five per-cent of seniors in the Eastern Coachella Valley report food insecurity and reduce the size of meals or skip meals entirely because of income restrictions. This food insecurity is twice as likely among Hispanic/Latinos to skip or reduce the size of meals due to

cost. Approximately 40.8% of seniors reporting food insecurity did not eat for an entire day because of lack of financial resources and did so at least once monthly. Our personal visits to seniors in these areas show a dire situation. All of the participants live well below the poverty level, some on only \$600.00 per month.

In the most recent fiscal year, we added congregate meal service to Mecca, increased service at the Indio Senior Center and increased congregate service in Thermal and Coachella. The total number of congregate meals served in the Eastern Coachella Valley was 20,958. This is over half of all congregate meals served in our program.

Project Goal, Objectives and Methodology: The goal of this project is to stabilize and expand home delivered and congregate meal service to seniors, age 60 and above in the Eastern Coachella Valley and unincorporated areas of Thermal, Mecca, and North Shore Salton Sea. This project provides much needed food for seniors who would otherwise have no effective care and support from their family or community. The requested amount of \$30,000 would insure that daily home delivered meals will continue to be provided to a growing population of seniors in this impoverished area. The Mizell program is unique in that it utilizes paid drivers who become familiar with the seniors on their route. Each driver is CPR certified and trained to recognize health and social problems to allow for early intervention. Because our drivers see their clients five (5) days a week they are uniquely positioned to recognize problems and through our extensive information and referral programs, provide additional services beyond the daily food delivery. For many, our driver is their only contact with the outside world. In addition, the congregate meal program continues to grow to new sites and expansion at existing sites. This program provides an opportunity for seniors to socialize, learn about services, and meet their daily nutritional needs.

Objective 1. Continue to identify frail and homebound seniors in Eastern Coachella Valley who are experiencing food insecurity and qualified for Meals On Wheels;

- **Activities:** (1) Perform outreach services in mobile home parks, identified senior living complexes and work with local senior centers, hospitals, and medical facilities in identifying qualified clients. (2) Perform initial evaluations and home visits with the qualified clients to enroll in the program.

Objective 2: Maintain Meals On Wheels Delivery service to over 300 seniors in the Eastern Coachella Valley with a focus on the most underserved areas and document referrals made to additional resources and perform regular re-assessments and high client satisfaction.

- **Activities:** (1) Document and follow-up referrals made to ensure that each client is receiving necessary services (2) Enroll an additional 25 new clients to the Meals on Wheels Program (3) Re-assess each client at least every six months to determine continued eligibility and need for any additional services. (4) Perform client satisfaction surveys at least every six months and make necessary adjustments.

Objective 3: Maintain and continue to expand congregate meal service to Mecca, Thermal, Coachella, and Indio and increase congregate meals served by at least 10% in these areas.

- **Activities:** (1) Support and train congregate nutrition sites to increase service and safe food handling practices (2) Provide necessary equipment and supplies to support increased services (3) Maintain sign-in sheets to document meals served at each site

Timeline: The activities related to Objective 1 will begin upon award. The goal is that 25 new clients will be enrolled in the project during the term of the grant while maintaining the current number of clients served. The activities outlined in Objectives 2 and 3 will be on-going. Documentation will be provided for each with grant reports.

Persons Served: The funds will directly provide daily Meals On Wheels to seniors over age 60 who are mostly Hispanic/Latino and who are frail, homebound and experiencing food insecurity in Indio, Coachella and the unincorporated areas of Eastern Riverside County. In addition, congregate nutrition sites will be maintained and expanded for low income Hispanic/Latino seniors over age 60 in Eastern Riverside County.

Relationship to Community Projects: Mizell works closely with Senior Centers in Thermal, Coachella, Mecca, and Indio in providing congregate meals to clients at those senior centers. In addition, we utilize the resources of those centers to identify clients eligible for Meals On Wheels. We work with FIND Food Bank and Hidden Harvest for supplemental nutrition for clients and also identify clients unable to make home cooked meals, even if provided food to do so.

Project Outcomes and Evaluation: The key outcomes for this project will be to provide daily nutrition to very low income Hispanic/Latino seniors who are experiencing food insecurity in the most impoverished areas of the Eastern Coachella Valley. The Meals On Wheels Association of America *Senior Hunger in America: Differences across States and Rural and Urban Areas (November 2009)* found that in California, 65% of seniors between 50% and 200% of the Federal Poverty level were found to have "food insecurity." The MOW Association also found that seniors who experience hunger are at risk for serious health problems. Hunger increases the risk for stroke, exacerbates pre-existing ill health conditions, limits the efficiency of many prescription drugs, and may affect brain chemistry increasing the incidence of depression and isolation. Comprehensive nutritional services will directly impact these documented effects of poor nutrition among the older population. The key outcomes will be measured by the number of new clients enrolled and maintained in the program in addition to the results of referrals for additional resources, client visits and satisfaction surveys. Progress toward the objectives will be measured by monitoring the number of new clients enrolled and adjusting outreach efforts to insure that the objectives are reached. All Outreach and referrals will be documented and followed and records will be maintained of all client surveys.

Grant funds will be used to directly provide additional Meals On Wheels service to frail, homebound clients over age 60 who reside in Coachella and unincorporated areas of Eastern Riverside County. This includes food purchase, preparation and delivery. Congregate meal service will also be expanded in this area.

Project Future: Mizell Senior Center has been providing Meals On Wheels to the community since 1982. This is a core service of the organization and the majority of our fund development efforts are devoted to this program. Through prudent fiscal management, the development of sufficient reserves and a concerted effort to expand fund development resources we are confident that this program will continue well into the future. In addition, we have a contract with the Riverside County Office On Aging for four years with our expanded program. Development of long range and sustainable funding for programs is a major priority.

Governance, Executive Leadership and Key Personnel/Staff Qualifications: Mizell Senior Center is governed by a volunteer Board consisting of 24 members. The board meets at least 10 times each year and is actively involved in the organization through reporting from each department Director and the Executive Director and in fund development. There is an Executive Committee, Additional Committees are Finance, Strategic Plan Implementation, Fund Development and Board Development. The Board makes decisions based upon facts presented and via majority vote. The Staff assigned to the Meals On Wheels Project are Executive Chef and Nutrition Program Director, Kelly Wells with over 21 years of food preparation experience from owning his own bakery to Food Service Director for the San Francisco YMCA, serving over 12,000 meals per day for seven years and as Chef for the Mizell Program for 4 years. All staff are Food Safe Certified and the Kitchen is rated "A" by the County of Riverside Department of Health.

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V. Project Budget

Provide a detailed line-item budget for your project by completing the table below.

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

- 1) Line item requests for materials, supplies, equipment and others:
 - a. Identify and list the type of materials, supplies, equipment, etc.
 - b. Specify the unit cost, number of units, and total cost
 - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff, compensation, benefits:
 - a. Identify the position; for each position request, specify the hourly rate and the number of hours (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
 - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)

Line Item Description	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Food for Meals (Meals on Wheels)	115,000 meals @ \$2.45 per meal	\$69,300	\$187,450	\$25,000	\$281,750
Food for Meals (Congregate)	40,000 meals @ \$2.88 per meal	\$50,000	\$60,200	\$5,000	\$115,200
Kitchen Staff, Delivery, Outreach, Support Staff (MOW)	115,000 total meals @ \$3.25 per meal	\$35,500	\$338,250		\$373,750
Kitchen Staff, Delivery, Outreach, Support Staff (Congregate)	40,000 meals @ \$3.15 per meal	\$6,000	\$120,000		\$126,000
Vehicle Expense, packaging, supplies, other direct costs (MOW)	115,000 meals @ \$1.82 per meal	\$55,000	\$154,300		\$209,300
Delivery, packing, supplies, other direct costs (Congregate)	40,000 meals @ \$1.50 per meal	\$15,000	\$45,000		\$60,000
TOTALS:		\$230,800	\$905,200	\$30,000	\$1,166,000

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

Secured/Awarded

Name of Funder: Foundation, Corporation, Government	Amount
Riverside County Office on Aging	\$712,300
Desert Classic Charities	\$ 25,000
Jewish Federation of the Desert Communities	\$ 20,000
City of Palm Springs	\$ 45,000
Wells Fargo Foundation	\$ 10,000
Rotary Foundation	\$ 4,000

Pending

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Champions Volunteer Foundation	\$5,000	January 2016
Agua Caliente Band of Cahuilla Indians	\$10,000	January 2016
S. L. Gimbel Foundation	\$30,000	October 2015
Walmart Foundation	\$25,000	January 2016
City of Indian Wells	\$10,000	March 2016

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	\$362,574	18%	Program Fees	\$386,314	18%
Fundraising/Special Events	\$137,174	7%	Interest Income	\$31,318	2%
Corp/Foundation Grants	\$150,349	8%	Other: Rental	\$100,612	5%
Government Grants	\$797,987	39%	Other: T. Store	\$58,874	3%

Notes:

Total Funding \$2,025,202. This amount does not include gains from Endowment Fund or expenses of management fees for Endowment Fund or assets in the Pooled Income Fund.

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VII. Financial Analysis

Agency Name: Mizell Senior Center

Most Current Fiscal Year (Dates): From 7/01/2013 To: 6/30/2014

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

Form 990, Part IX: Statement of Functional Expenses

1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$1,990,566	\$1,735,714	\$154,510	\$100,342

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

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
1,990,566	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	87%	8%	5%

3) Calculate the difference between your CURRENT year budget for management & general expenses and your previous management & general expenses per your 990 (Column C)

Percentage of Organization's Current Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
9%	8 %	1%

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

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

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
\$187,183	\$175,880	\$100,542	

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end	Excess or (Deficit) Prior fiscal year end
\$54,151	\$(11,096)

Notes:

Quick Ratio based upon Financial statement ending: May 31,2015

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). If you completed a 990-EZ, fill out the attached Part IX, Functional Expenses of the 990 form using figures from your 990-EZ	
For past grantees, a copy of your most recent final report.	

Mizell Senior Center Board of Directors

July 2015

President

Rick Peterson - Palm Springs Infniti
P.O. Box 4392
Palm Springs, CA 92263-4392
Phone: C: 949-677-3864
E-Mail: rcpeterson1956@gmail.com
Life Member - Joined 2010

Executive Vice President

Mark Marshall
ML Marshall Wealth Management
1968 East Chia Road
Palm Springs, CA 92262
Phone: W: 916-212-4760 F: 760-841-3913
E-Mail: marshall@mlmwm.com
Board Tenure Expires: June 30, 2016 - Joined 2010

First Vice President

Brian Wachs, CPA
435 East Tahquitz Canyon Way
Palm Springs, CA 92262
Phone: W: 325-7799 F: 322-0448 C: 218-7606
E-Mail: BWachs@blwachscpa.com
Board Tenure Expires: June 30, 2017 - Joined 2005

Second Vice President

Josh Zipperman
Burke Rix Communications
431 South Palm Canyon Drive, Suite 206
Palm Springs, CA 92262
Phone: W: 327-9708 x24 F: 327-9788
E-Mail: josh@burkerix.com
Board Tenure Expires: June 30, 2018 - Joined 2012

Third Vice President

Elaine Hill
Hill Walker, LLP
560 Paseo Dorotea, Suite 1
Palm Springs, CA 92264
Phone: W: 864-9800 H: 323-1207 C: 408-2599 F: 864-9816
E-Mail: ElaineHill330@gmail.com
Board Tenure Expires: June 30, 2017 - Joined 2014

Treasurer

Debbie Brandt, CPA
Brabo & Carlsen, LLP
1111 E. Tahquitz Canyon Say, Suite 203
Palm Springs, CA 92262
Phone: W: 320-0848 C: 602-402-4753 F: 322-4626
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Board Tenure Expires: June 30, 2016 - Joined 2013

Secretary

Ronald Fragen, MD
64893 Saragossa Drive
Palm Springs, CA 92264
Phone: H: 327-1173 C: 408-2212 F: 325-4306
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Board Tenure Expires: June 30, 2018 - Joined 2012

Executive Director

Ginny Foat
480 South Sunrise Way
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Phone: W: 323-5689 x102 C: 413-2650
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Marjorie Conley Aikens—Retired Educator
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Palm Springs, CA 92264
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Board Tenure Expires: June 30, 2017 - Joined 2002

Carrie Allan—Retired Physical Therapist
1733 Grand Bahama West
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Life Member - Joined 1997

Judge Arthur Block, Ret
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Board Tenure Expires: June 30, 2016 - Joined 2010

Craig Borba, Ed.D. - Education Consultant
1205 Camino Mirasol
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Board Tenure Expires: June 30, 2017 - Joined 2011

Patrick Caster
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Board Tenure Expires: June 30, 2017 - Joined 2014

Sidney Craig - Retired Businessman
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Board Tenure Expires: June 30, 2016 - Joined 2007

Larry Davis—Forest Lawn
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Board Tenure Expires: June 30, 2017 - Joined 2014

Virginia Eberhard, Ph.D.—Retired Educator
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Board Tenure Expires: June 30, 2017 - Joined 2011

Lauri Kibby—Property Development
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Board Tenure Expires: June 30, 2018 - Joined 2015

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Board Tenure Expires: June 30, 2018 - Joined 2012

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Life Member - Joined 1993

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Life Member - Joined 2004

Kristin Schmidt, Director of Nursing

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Board Tenure Expires: June 30, 2018 - Joined 2015

John Williams—Retired Businessman

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Life Member - Joined 2006

Mizell Senior Center Proposed 2015/2016 Budget

	2015 Budget	2015 Actual	2016 BUDGET
INCOME		End of Jun 2015	
405.10 Donations			
405.11 · Membership Dues	62,000.00		62,000.00
405.12 · General Donations	54,500.00		75,000.00
405.13 · Tributes	2,500.00		5,000.00
405.19 - In-Kind Donations	80,000.00		80,000.00
405.xx - Manilow Concert Donation			7,500.00
Total 405.10 Donations Income	199,000.00	-	229,500.00
425.10 Business Partner Income			
425.11 - Business Partners Revenue	85,000.00		75,000.00
425.12 - Senior Report Advertising	7,500.00		5,000.00
Total 425.10 Bus. Partner Income	92,500.00	-	80,000.00
430.10 Grants			
430.11 - City of Palm Springs	60,000.00		60,000.00
430.14 - New Grants	25,000.00		-
430.15 - Endowment Grant	65,000.00		68,000.00
430.20 - Interest Income	20.00		50.00
430.70 · Desert Healthcare District			189,000.00
430.75 · Grants - Other	200,000.00		150,000.00
430.83 - CDBG - Palm Springs	27,074.00		-
430.84 - CDBG - County of Riverside			10,000.00
430.86 - Weingart	50,000.00		-
Total 430.10 Grants Income	427,094.00	-	477,050.00
440.10 Nutrition Services Revenue			
440.11 - MOW Grant - OOA	503,239.00		503,239.00
440.12 · MOW Donations County Clients	60,000.00		60,000.00
440.13 · MOW Donations	75,000.00		75,000.00
440.21 - CG Grant - OOA	210,500.00		210,500.00
440.22 - CG Donations County Clients	60,000.00		60,000.00
440.23 - CG Donations General	20,000.00		20,000.00
440.31 - Nutrition Grant - Other	100,000.00		100,000.00
Total 440.10 Nutrition Services Income	1,028,739.00	-	1,028,739.00
450.10 Fundraising Events			
450.15 · Stars Society	45,000.00		50,000.00
450.17 - See's Candy Holiday Sales	3,000.00		-
450.28 - Jazz Event	10,000.00		5,000.00
450.29 - Country Western Event	10,000.00		5,000.00
450.30 - Historic House - O'Donnell Event	40,000.00		40,000.00
450.31 - Dia de Los Muertos	30,000.00		-
450.32 - Board House Parties	5,000.00		5,000.00
450.33 - Direct Mailing - Appeals	40,500.00		35,000.00

Mizell Senior Center Proposed 2015/2016 Budget

	2015 Budget	2015 Actual	2016 BUDGET
Total 450.10 Fundraising Event Income	183,500.00	-	140,000.00
451.10 Stars Among Us Event			
451.11 - Stars Among Us - Ticket	47,000.00		50,000.00
451.12 - Stars Among Us - Sponsors	175,000.00		200,000.00
451.13 - Stars Among Us - Live Auction	90,000.00		90,000.00
451.14 - Stars Among Us - Silent Auction	25,000.00		25,000.00
451.15 - Stars Among Us - Ads	4,000.00		4,000.00
451.00 - Stars Among Us - In Kind			17,500.00
Total 451.10 Stars Among Event	341,000.00	-	386,500.00
455.10 Room Rentals			
455.11 - Room Rental Income	20,000.00		20,000.00
Total 455.10 Room Rental Income	20,000.00	-	20,000.00
460.10 Programs			
460.11 - General Programs	150.00		-
460.13 - Party Bridge	11,000.00		9,500.00
460.14 - Inst. Bridge- Beg	1,700.00		2,000.00
460.15 - Instr. Bridge-Intermediate	2,000.00		3,600.00
460.16 - ACLB Bridge	9,000.00		5,000.00
460.18 - Computer Classes	7,500.00		6,500.00
460.20 - New Programs	20,000.00		20,000.00
460.21 - Bingo	22,000.00		20,000.00
460.22 - Music	5,560.00		3,100.00
460.23 - Board & Staff Activities	750.00		500.00
460.24 - Yoga Classes	7,500.00		11,800.00
460.27 - Zumba Gold			9,700.00
460.28 - Line Dance Class	1,000.00		1,000.00
460.29 - Thrift Store Income	60,000.00		55,000.00
460.31 - Tai Chi	2,200.00		1,600.00
460.32 - Mature Driving	4,600.00		4,600.00
460.34 - Installation	7,500.00		7,500.00
460.35 - Coffee Station	4,250.00		2,500.00
460.36 - Creative Writing	400.00		500.00
460.38 - Sunline	55,800.00		52,300.00
460.40 - Pastel Art	3,000.00		2,200.00
460.43 - Ballroom Dance	2,500.00		2,000.00
460.48 - Spanish	2,800.00		2,600.00
460.52 - Qigong	4,250.00		5,000.00
460.54 - Balance/Fall Class	15,000.00		6,000.00
460.55 - Snacks/Misc. Food	1,800.00		1,400.00
Total 460.10 Program Income	252,260.00	-	235,900.00
470.10 Senior Living Expo			
470.12 - Sponsors	7,500.00		10,000.00

Mizell Senior Center Proposed 2015/2016 Budget

	2015 Budget	2015 Actual	2016 BUDGET
470.14 - Advertising / Booth Income	8,500.00		13,000.00
Total 470.10 Senior Living Expo Income	16,000.00	-	23,000.00
TOTAL INCOME	2,560,093.00	0.00	2,620,689.00
Expenses			
700.10 Membership			
700.11 - Membership Expenses	2,000.00		3,000.00
700.12 - Membership Printing	1,500.00		1,500.00
700.13 - Membership Postage	3,100.00		2,500.00
700.14 - Senior Reports Printing	9,600.00		9,600.00
700.15 - Senior Reports Postage	2,475.00		2,475.00
Total 700.10 Membership Expense	18,675.00	-	19,075.00
705.10 Business Partner			
705.11 - Business Partners Expense	1,200.00		1,000.00
Total 705.10 Business Partner Expense	1,200.00	-	1,000.00
710.10 Administrative			
710.11 - General Insurance	10,000.00		13,517.00
710.12 - Printing/Admin.	850.00		1,000.00
710.13 - Postage/Admin.	1,700.00		1,500.00
710.14 - Telephone	6,000.00		7,500.00
710.15 - Dues & Subscriptions	2,000.00		1,500.00
710.16 - Office Equip/Repair and Maint.	300.00		300.00
710.17 - Office Supplies	5,000.00		5,000.00
710.18 - Office Equip./Rental	21,600.00		21,600.00
710.19 - Taxes and Licenses	1,820.00		1,320.00
710.20 - Public Relations	4,500.00		12,000.00
710.21 - Professional Fees	18,000.00		18,000.00
710.22 - Computer Expenses	1,500.00		4,000.00
710.23 - Bank Charges	7,000.00		7,800.00
710.24 - Seminars/Staff Training	3,800.00		8,700.00
710.26 - Mileage	1,500.00		1,000.00
710.28 - Rent	80,000.00		80,000.00
710.32 - Advertising	3,500.00		25,500.00
710.35 - Contact Svcs Backgrd Check	150.00		150.00
710.36 - Website Exp.	5,000.00		2,000.00
710.37 - Aunt Betty's Attic Sales Tax - 9%	8,520.00		4,800.00
Total 710.10 Administrative Expense	182,740.00	-	217,187.00
720.10 Nutrition Services/Home Visits			
720.11 - Meals On Wheels Food	240,000.00		240,000.00
720.12 - Congregate Food	115,000.00		115,000.00
720.13 - Vehices/Repair & Fuel	50,500.00		37,200.00

Mizell Senior Center Proposed 2015/2016 Budget

	2015 Budget	2015 Actual	2016 BUDGET
720.14 · Auto Ins & Lic Fees	7,445.00		6,593.00
720.15 · Kitchen Expenses	14,000.00		14,000.00
720.16 - Meal Service Supplies	36,000.00		36,000.00
720.24 - Nutrition Mileage	2,000.00		1,380.00
720.25 - Nutrition Telephone	7,000.00		6,720.00
720.28 - Kitchen Equipment	5,400.00		5,400.00
720.29 - Nut. Prog. Consultant/Contractor	5,500.00		5,500.00
Total 720.10 Nutrition Services Expense	482,845.00	-	467,793.00
725.10 Special Events			
725.15 - Stars Society	2,000.00		1,500.00
725.16 - Stars Among Us	185,000.00		225,000.00
725.28 -Jazz Event	3,500.00		4,000.00
725.29 - Country West	3,500.00		2,250.00
725.30 - Historic House Event	11,500.00		17,500.00
725.31 - Dia de Los Muertos	20,000.00		-
725.32 - Bowling Event	1,000.00		-
725.33 - Direct Mailing - Appeals	3,000.00		3,000.00
725.34 - Board Fundraising Misc.	10,000.00		1,000.00
Total 725.10 Special Events Expense	239,500.00	-	254,250.00
730.10 Programs			
730.11 · General Program Exp.	2,800.00		2,800.00
730.13 · Bingo Expenses	2,000.00		1,800.00
730.14 · Computer Classes	4,640.00		3,786.00
730.15 - New Program Expense	10,000.00		10,000.00
730.19 - Party Bridge Expense	5,000.00		5,500.00
730.20 - Instr. Bridge - Beg	1,020.00		1,200.00
730.21 - Instr. Bridge - Int.	1,200.00		2,660.00
730.22 - Music Programs	2,700.00		1,750.00
730.23 - Board / Staff Activities	10,000.00		15,000.00
730.26 - Yoga Expense	4,200.00		7,080.00
730.27 - Zumba Gold			5,820.00
730.28 - Line Dance Class Expense	600.00		600.00
730.29 · Thrift Store Expense	200.00		500.00
730.31 - Tai Chi	1,260.00		1,260.00
730.32 · Mature Driving	3,500.00		3,000.00
730.34 - Installation	4,500.00		5,000.00
730.35 · Coffee Station	5,000.00		5,000.00
730.38 · Sunline	51,100.00		47,350.00
730.40 - Pastel Art	400.00		-
730.43 - Ballroom Dance	1,750.00		1,200.00
730.48 - Spanish	1,680.00		1,560.00
730.49 - Program Consultants (Fall Prev)	1,000.00		59,500.00
730.53 - Qigong	2,500.00		3,000.00
730.54 - Fall Prevention Program (Supplies)	165,000.00		16,600.00

Mizell Senior Center Proposed 2015/2016 Budget			
	2015 Budget	2015 Actual	2016 BUDGET
730.xx - Fall Prevention (Travel/trans)			8,750.00
730.54 - Fall Prevention (Office Rental)			6,300.00
730.55 - Snacks/Misc. Food	3,400.00		3,180.00
Total 730.10 Program Expense	285,450.00	-	220,196.00
750.10 Senior Living Expo Expenses			
750.11 - Postage / Printing - Expo	300.00		300.00
750.14 - Miscellaneous Expenses - Expo	1,500.00		1,750.00
Total 750.10 Senior Living Expo Expense	1,800.00	-	2,050.00
755.10 Operational Building			
755.11 · Building Insurance	10,000.00		-
755.12 · Janitorial Supplies	5,500.00		5,500.00
755.13 · Utilities	38,000.00		42,000.00
755.14 · Bldg. Repairs & Maint.	18,000.00		33,000.00
Total 755.10 Operational Building Expense	71,500.00	-	80,500.00
770.10 Admin. Salaries/Taxes/Benefits			
770.16 - Salaries & Wages	897,428.00		1,084,664.00
770.19 · Payroll Tax Mizell - 9%	80,769.00		97,619.00
770.20 · Health Insurance	80,000.00		80,000.00
770.21 · Workmens Compensation	34,200.00		48,000.00
780.10 - Payroll Processing Fees	3,000.00		3,375.00
Total 770.10 Admin Salaries/Taxes/Benefits	1,095,397.00	-	1,313,658.00
TOTAL EXPENSE	2,379,107.00	0.00	2,575,709.00
NET INCOME	180,986.00	0.00	44,980.00
Other Income/Expense			
820.10 - Other Expenses - Depreciation			
820.11 - Building Depreciation	60,792.00		
820.12 - Equipment Depreciation	2,772.00		
820.13 - Vehicle Depreciation	6,768.00		
720.14 - Computer Lab Depreciation	3,600.00		
Total 820.10 - Other Expense - Depreciation	73,932.00	-	-

Mizell Senior Center Profit & Loss Budget Performance May 2015

	May 15	Budget	Jul '14 - May 15	YTD Budget	Annual Budget
Ordinary Income/Expense					
Income					
405.10 · Donations	3,550.00	5,000.00	56,995.00	57,000.00	62,000.00
405.11 · Membership Dues	-3,015.13	4,000.00	117,916.01	51,000.00	54,500.00
405.12 · General Donations	125.00	200.00	9,095.00	2,300.00	2,500.00
405.13 · Tributes	6,668.00	6,668.00	73,348.00	73,348.00	80,000.00
405.19 · In-Kind Donations					
Total 405.10 · Donations	7,327.87	15,866.00	257,354.01	183,648.00	199,000.00
425.10 · Business Partners Income					
425.11 · Business Partners Revenue	2,300.00	5,500.00	52,900.00	80,000.00	85,000.00
425.12 · Senior Reports-Advertising	0.00	0.00	0.00	5,000.00	7,500.00
Total 425.10 · Business Partners Income	2,300.00	5,500.00	52,900.00	85,000.00	92,500.00
430.10 · Grants					
430.11 · City Of Palm Springs	0.00	0.00	60,000.00	60,000.00	60,000.00
430.14 · New Grants / General	0.00	5,000.00	52,000.00	25,000.00	25,000.00
430.15 · Endowment Grant	5,701.58	5,417.00	61,347.40	59,587.00	65,000.00
430.20 · Interest Income	2.65	1.67	11.89	18.37	20.00
430.75 · Foundation Grants	10,000.00	25,000.00	10,000.00	190,000.00	200,000.00
430.83 · CDBG - Palm Springs	7,995.35	0.00	7,995.35	27,074.00	27,074.00
430.86 · Weingart	0.00	0.00	50,000.00	50,000.00	50,000.00
Total 430.10 · Grants	23,699.58	35,418.67	241,354.64	411,679.37	427,094.00
440.10 · Nutrition Services Revenue					
440.11 · MOW Grant - OOA	49,869.00	40,872.80	570,281.57	462,366.20	503,239.00
440.12 · MOW Donations County Client	2,417.25	5,000.00	49,077.24	55,000.00	60,000.00
440.13 · MOW Donations General	3,520.00	6,250.00	38,872.04	68,750.00	75,000.00
440.21 · CG Grant - OOA	18,379.68	17,651.24	197,355.84	192,848.76	210,500.00
440.22 · CG Donations County Clients	6,336.08	5,000.00	72,374.32	55,000.00	60,000.00
440.23 · CG Donations General	920.25	1,681.36	14,122.02	18,318.64	20,000.00
440.31 · Nutrition Grant - Other	10,000.00	0.00	42,100.00	90,000.00	100,000.00
Total 440.10 · Nutrition Services Revenue	91,442.26	76,455.40	984,183.03	942,283.60	1,028,739.00
450.10 · Fundraising Events					
450.15 · Stars Club	2,191.66	2,500.00	38,874.96	42,500.00	45,000.00
450.17 · Holiday Sales	0.00	0.00	0.00	3,000.00	3,000.00
450.28 · Jazz Event	0.00	0.00	3,550.00	10,000.00	10,000.00
450.29 · Country West	4,500.00	7,500.00	5,450.00	10,000.00	10,000.00
450.30 · Historic House Event	0.00	0.00	38,720.00	40,000.00	40,000.00
450.31 · Dia de Los Muertos	0.00	0.00	2,552.08	30,000.00	30,000.00
450.32 · Bowling Event	0.00	0.00	0.00	0.00	5,000.00
450.33 · Direct Mailing - Appeals	0.00	5,000.00	19,494.83	36,500.00	40,500.00
Total 450.10 · Fundraising Events	6,691.66	15,000.00	108,641.87	172,000.00	183,500.00

Mizell Senior Center Profit & Loss Budget Performance May 2015

	May 15	Budget	Jul '14 - May 15	YTD Budget	Annual Budget
451.10 - Stars Among Us Event					
451.11 - Stars Among Us - Ticket	245.00	0.00	40,430.00	47,000.00	47,000.00
451.12 - Stars Among Us - Sponsors/Do...	5,000.00	0.00	193,990.00	175,000.00	175,000.00
451.13 - Stars Among Us - Live Auction	600.00	0.00	90,394.00	90,000.00	90,000.00
451.14 - Stars Among Us - Silent Auction	0.00	0.00	18,310.00	25,000.00	25,000.00
451.15 - Stars Among Us - Ads	850.00	0.00	3,275.00	4,000.00	4,000.00
451.17 - Stars Among Us Matching	0.00		-100.00		
Total 451.10 - Stars Among Us Event	6,695.00	0.00	346,299.00	341,000.00	341,000.00
455.10 - Room Rental					
455.11 - Room Rental Income	725.00	2,000.00	17,657.90	18,500.00	20,000.00
Total 455.10 - Room Rental	725.00	2,000.00	17,657.90	18,500.00	20,000.00
460.10 - Program Income					
460.11 - General Programs	0.00	0.00	1.50	150.00	150.00
460.13 - Party Bridge	508.00	900.00	7,655.01	10,400.00	11,000.00
460.14 - Instr. Bridge-Beg	0.00	0.00	2,141.00	1,700.00	1,700.00
460.15 - Instr. Bridge-Intermediate	0.00	0.00	1,671.00	2,000.00	2,000.00
460.16 - ACLB Bridge	0.00	700.00	2,900.00	8,500.00	9,000.00
460.18 - Computer Classes	125.00	630.00	5,730.00	6,970.00	7,500.00
460.20 - New Programs	1,500.00	1,500.00	25,397.00	19,000.00	20,000.00
460.21 - Bingo	980.00	1,200.00	17,467.75	20,800.00	22,000.00
460.22 - Music	40.00	100.00	2,952.00	5,510.00	5,560.00
460.23 - Board & Staff Activities	0.00	0.00	355.00	750.00	750.00
460.24 - Yoga Classes	964.00	600.00	12,094.00	6,900.00	7,500.00
460.28 - Line Dance Class	0.00	0.00	990.00	1,000.00	1,000.00
460.29 - Thrift Store Income	0.00	5,000.00	49,796.25	56,000.00	60,000.00
460.31 - Tai Chi	4,004.90	200.00	1,133.00	2,100.00	2,200.00
460.32 - Mature Driving	0.00	300.00	4,280.00	4,300.00	4,600.00
460.34 - Installation	445.00	0.00	7,340.00	7,500.00	7,500.00
460.35 - Coffee Station	0.00	0.00	2,182.03	3,950.00	4,250.00
460.36 - Creative Writing	106.19	350.00	480.00	400.00	400.00
460.38 - Sunline	3,982.00	0.00	49,044.50	52,300.00	55,800.00
460.40 - Pastel Art	95.00	150.00	1,755.00	2,850.00	3,000.00
460.43 - Ballroom Dance	0.00	0.00	1,870.00	2,500.00	2,500.00
460.48 - Spanish	125.00	0.00	843.00	2,800.00	2,800.00
460.52 - Qigong	420.00	300.00	5,250.00	3,950.00	4,250.00
460.64 - Balance / Fall Class	4,650.10	1,250.00	5,240.10	13,750.00	15,000.00
460.55 - Snacks / Misc. Food	115.35	150.00	1,390.55	1,650.00	1,800.00
Total 460.10 - Program Income	18,060.54	17,180.00	209,959.69	237,730.00	252,260.00

Mizell Senior Center Profit & Loss Budget Performance May 2015

	May 15	Budget	Jul '14 - May 15	YTD Budget	Annual Budget
470.10 · Senior Living Expo					
470.12 · Sponsors	0.00	0.00	6,570.00	7,500.00	7,500.00
470.14 · Advertising/Booth Income	0.00	0.00	6,413.50	8,500.00	8,500.00
Total 470.10 · Senior Living Expo	0.00	0.00	12,983.50	16,000.00	16,000.00
Total Income	156,941.91	167,422.07	2,231,333.64	2,407,840.97	2,560,093.00
Gross Profit	156,941.91	167,422.07	2,231,333.64	2,407,840.97	2,560,093.00
Expense					
700.10 · Membership					
700.11 · Membership Expenses	153.12	118.00	2,794.68	1,882.00	2,000.00
700.12 · Membership - Printing	582.99	125.00	1,835.34	1,375.00	1,500.00
700.13 · Membership Postage	683.70	235.00	2,531.51	2,865.00	3,100.00
700.14 · Senior Reports Printing	0.00	0.00	250.00	6,400.00	9,600.00
700.15 · Senior Reports Postage	0.00	0.00	0.00	1,650.00	2,475.00
Total 700.10 · Membership	1,419.81	478.00	7,411.53	14,172.00	18,675.00
705.10 · Business Partners					
705.11 · Business Partners Expense	15.38	100.00	860.58	1,100.00	1,200.00
705.10 · Business Partners - Other	0.00		15.00		
Total 705.10 · Business Partners	15.38	100.00	875.58	1,100.00	1,200.00
710.10 · Admin. Expenses					
710.11 · General Insurance	985.58	875.00	8,803.15	9,125.00	10,000.00
710.12 · Printing/Admin.	0.00	70.00	982.61	780.00	860.00
710.13 · Postage/Admin.	331.89	141.00	1,375.44	1,559.00	1,700.00
710.14 · Telephone	480.03	500.00	5,116.98	5,500.00	6,000.00
710.15 · Dues & Subscriptions	10.00	100.00	869.00	1,650.00	2,000.00
710.16 · Office Equip/Repair and Maint.	0.00	25.00	0.00	275.00	300.00
710.17 · Office Supplies	358.73	416.00	3,998.03	4,576.00	5,000.00
710.18 · Office Equip/Rental	544.76	1,200.00	19,789.74	18,600.00	21,600.00
710.19 · Taxes and Licenses	0.00	0.00	1,308.10	1,820.00	1,820.00
710.20 · Public Relations	1,151.13	0.00	6,479.37	4,500.00	4,500.00
710.21 · Professional Fees	2,700.00	300.00	22,327.85	17,700.00	18,000.00
710.22 · Computer Expenses	0.00	0.00	6,602.77	1,375.00	1,500.00
710.23 · Bank Charges	485.73	540.00	6,947.69	6,460.00	7,000.00
710.24 · Seminars/Staff Training	0.00	250.00	622.07	3,100.00	3,800.00
710.26 · Mileage	0.00	125.00	719.58	1,375.00	1,500.00
710.28 · Rent	6,668.00	6,668.00	73,348.00	73,348.00	80,000.00
710.32 · Advertising	1,000.00	0.00	3,360.41	3,500.00	3,500.00
710.35 · Contract Services Backgrd Ch...	0.00	12.50	89.70	137.50	150.00
710.36 · Website Expense	0.00	0.00	6,777.14	5,000.00	5,000.00
710.37 · Aunt Betty's Attic Sales Tax	0.00	710.00	0.00	7,810.00	8,520.00
Total 710.10 · Admin. Expenses	14,725.85	12,057.50	169,517.63	168,190.50	182,740.00

Mizell Senior Center Profit & Loss Budget Performance May 2015

	May 15	Budget	Jul '14 - May 15	YTD Budget	Annual Budget
720.10 - Nutrition Services/Home Visits					
720.11 - Meals On Wheels Food	22,680.09	19,424.27	276,949.25	220,575.73	240,000.00
720.12 - Congregate Food	9,596.18	9,609.45	108,265.16	105,390.55	115,000.00
720.13 - Vehicle/Repair & Fuel	5,585.19	4,208.00	34,082.37	46,288.00	50,500.00
720.14 - Auto Ins & Lic Fees	492.78	525.00	6,181.90	6,920.00	7,445.00
720.15 - Kitchen Expenses	952.98	1,154.50	11,380.57	12,845.81	14,000.00
720.16 - Meal Service Supplies	3,209.10	3,000.00	39,208.37	33,000.00	36,000.00
720.24 - Nutrition Millease	100.13	167.00	1,016.98	1,837.00	2,000.00
720.25 - Nutrition Telephone	560.89	583.00	6,065.46	6,473.00	7,000.00
720.28 - Kitchen Equipment	8,205.08	600.00	11,873.94	5,200.00	5,400.00
720.29 - Nut. Prog. Consult/ Contractor	343.33	0.00	2,913.33	4,900.00	5,500.00
Total 720.10 - Nutrition Services/Home Vi...	51,725.75	39,271.22	497,938.33	443,370.09	482,845.00
725.10 - Special Events Expense					
725.15 - Stars Club	0.48	0.00	1,101.28	2,000.00	2,000.00
725.16 - Stars Among Us					
001 - SAU Venue	0.00	0.00	6,425.00		
002 - SAU Entertainment	0.00	0.00	32,765.30		
003 - SAU Postage	110.62		1,842.25		
004 - SAU Printing	0.00		5,865.67		
005 - SAU Production	0.00		124,419.00		
006 - SAU Advertising	0.00		1,350.00		
007 - SAU Miscellaneous	150.00		2,960.67		
008 - SAU Awards	0.00		719.40		
009 - SAU Photographer	0.00		1,000.00		
010 - SAU Catering	0.00		50,692.90		
725.16 - Stars Among Us - Other	0.00	0.00	0.00		
Total 725.16 - Stars Among Us	260.62	0.00	228,040.19	185,000.00	185,000.00
725.28 - Jazz Event	0.00	0.00	4,251.15	3,500.00	3,500.00
725.29 - Country West	1,427.66	0.00	2,531.00	3,500.00	3,500.00
725.30 - Historic House Event	0.00	0.00	17,621.52	11,500.00	11,500.00
725.31 - Dia de Los Muertos	0.00	0.00	3,328.30	20,000.00	20,000.00
725.32 - Bowling Event	0.00	500.00	0.00	1,000.00	1,000.00
725.33 - Direct Mailing - Appeals	0.00	0.00	2,366.04	2,000.00	3,000.00
725.34 - Board Fundraising Misc.	0.00	1,000.00	100.00	9,000.00	10,000.00
Total 725.10 - Special Events Expense	1,688.76	1,500.00	259,339.49	237,500.00	239,500.00

Mizell Senior Center Profit & Loss Budget Performance May 2015

	May 15	Budget	Jul '14 - May 15	YTD Budget	Annual Budget
730.10 · Program Expenses					
730.11 · General Program Exp.	56.15	150.00	2,975.24	2,592.00	2,800.00
730.13 · Bingo Expenses	528.15	0.00	1,588.80	2,000.00	2,000.00
730.14 · Computer Classes	198.00	378.00	3,489.00	4,322.00	4,640.00
730.15 · New Program Exp.	1,191.44	600.00	17,999.18	9,400.00	10,000.00
730.19 · Party Bridge Exp.	257.40	400.00	4,222.80	4,600.00	5,000.00
730.20 · Instr. Bridge-Beg	0.00	0.00	1,284.60	1,020.00	1,020.00
730.21 · Instr. Bridge-Int.	0.00	0.00	1,002.60	1,200.00	1,200.00
730.22 · Music Programs	100.00	50.00	2,174.18	2,700.00	2,700.00
730.23 · Board/Staff Activities	10.79	275.00	9,289.57	9,725.00	10,000.00
730.26 · Yoga Expense	578.40	340.00	7,256.40	3,860.00	4,200.00
730.28 · Line Dance Class Exp	0.00	0.00	594.00	600.00	600.00
730.29 · Thrift Store Expense	0.00	10.00	564.87	190.00	200.00
730.31 · Tai Chi	0.00	120.00	680.70	1,200.00	1,260.00
730.32 · Mature Driving	240.00	200.00	4,635.00	3,300.00	3,500.00
730.34 · Installation	0.00	0.00	4,546.37	4,500.00	4,500.00
730.35 · Coffee Station	594.04	500.00	5,206.93	4,600.00	5,000.00
730.38 · Sunline	4,113.50	3,800.00	44,079.25	47,900.00	51,100.00
730.40 · Pastel Art	0.00	0.00	0.00	400.00	400.00
730.43 · Ballroom Dance	0.00	0.00	1,122.00	1,750.00	1,750.00
730.48 · Spanish	0.00	0.00	430.80	1,680.00	1,680.00
730.49 · Program Consultants	0.00	0.00	0.00	1,000.00	1,000.00
730.53 · Qigong	262.00	120.00	3,150.00	2,380.00	2,500.00
730.54 · Fall Prevention Program	975.00	16,500.00	20,245.00	148,500.00	165,000.00
730.55 · Snacks / Misc. Food	169.88	283.00	2,992.19	3,113.00	3,400.00
Total 730.10 · Program Expenses	9,264.75	23,726.00	139,529.48	262,532.00	285,450.00
750.10 · Senior Living Expo Expenses					
750.11 · Postage/Printing-Expo	0.00	0.00	178.45	300.00	300.00
750.14 · Miscellaneous Expenses-Expo	0.00	0.00	1,773.83	1,500.00	1,500.00
Total 750.10 · Senior Living Expo Expen...	0.00	0.00	1,952.28	1,800.00	1,800.00
755.10 · Operational Building Expenses					
755.11 · Building Insurance	985.56	875.00	8,803.83	9,125.00	10,000.00
755.12 · Janitorial Supplies	531.51	500.00	5,482.53	5,250.00	5,500.00
755.13 · Utilities	2,333.07	2,600.00	38,745.93	35,200.00	38,000.00
755.14 · Bldg. Repairs & Maint.	3,460.12	1,500.00	17,697.43	16,500.00	18,000.00
Total 755.10 · Operational Building Expe...	7,330.26	5,475.00	70,729.72	66,075.00	71,500.00
770.10 · Admin. Salaries Taxes/Benefits					
770.16 · Salaries & Wages	72,833.24	74,687.83	811,572.75	822,740.17	897,428.00
770.19 · Payroll Tax Mizell	6,035.55	6,776.58	70,670.77	73,992.42	80,769.00
770.20 · Health Insurance	6,528.84	6,667.00	64,839.93	73,337.00	80,000.00
770.21 · Workmens Compensation	4,141.87	2,850.00	36,762.91	31,350.00	34,200.00
780.10 · Payroll Processing Fees	254.50	230.00	3,081.00	2,770.00	3,000.00
Total 770.10 · Admin. Salaries Taxes/Ben...	89,794.00	91,211.41	986,927.36	1,004,189.59	1,095,397.00

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Accrual Basis

Mizell Senior Center Profit & Loss Budget Performance May 2015


	May '15	Budget	Jul '14 - May '15	YTD Budget	Annual Budget
790.10 - Uncategorized Expenses	0.00		0.00		
Total Expense	175,964.56	173,819.13	2,134,221.40	2,198,929.18	2,379,107.00
Net Ordinary Income	-19,022.65	-6,397.06	97,112.24	208,911.79	180,986.00
Other Income/Expense					
Other Expense					
820.10 - Other Expense - Depreciation					
820.11 - Building Depreciation	5,066.00	5,066.00	55,726.00	55,726.00	60,792.00
820.12 - Equipment Depreciation	231.00	231.00	2,541.00	2,541.00	2,772.00
820.13 - Vehicle Depreciation	564.00	564.00	6,204.00	6,204.00	6,768.00
820.14 - Computer Lab Depreciation	300.00	300.00	3,300.00	3,300.00	3,600.00
Total 820.10 - Other Expense - Depreciation	6,161.00	6,161.00	67,771.00	67,771.00	73,932.00
Total Other Expense	6,161.00	6,161.00	67,771.00	67,771.00	73,932.00
Net Other Income	-6,161.00	-6,161.00	-67,771.00	-67,771.00	-73,932.00
Net Income	-25,183.65	-12,558.06	29,341.24	141,140.79	107,054.00

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX.

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21.				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22.				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	137,615.	116,973.	8,257.	12,385.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0.	0.	0.	0.
7 Other salaries and wages.	694,588.	592,083.	37,655.	64,850.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
9 Other employee benefits.	106,738.	92,040.	7,066.	7,632.
10 Payroll taxes.	75,411.	65,027.	4,992.	5,392.
11 Fees for services (non-employees):				
a Management.				
b Legal.				
c Accounting.	12,095.		12,095.	
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amt exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	9,764.	8,744.	1,020.	
12 Advertising and promotion.	1,905.	670.	545.	690.
13 Office expenses.	15,684.	1,616.	13,530.	538.
14 Information technology.				
15 Royalties.				
16 Occupancy.	125,204.	99,651.	19,739.	5,814.
17 Travel.	55,336.	54,365.	971.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.				
20 Interest.				
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.	95,735.	76,588.	19,147.	
23 Insurance.	19,176.	11,985.	7,191.	
24 Other expenses. (Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>FOOD COSTS</u>	405,427.	405,427.		
b <u>PROGRAM EXPENSES</u>	121,359.	121,359.		
c <u>REPAIRS/MAINTENANCE</u>	41,400.	38,553.	1,410.	1,437.
d <u>KITCHEN EXPENSES</u>	33,205.	33,205.		
e All other expenses.	39,924.	17,428.	20,892.	1,604.
25 Total functional expenses. Add lines 1 through 24e.	1,990,566.	1,735,714.	154,510.	100,342.
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).				

 <p>The Community Foundation Serving Riverside and San Bernardino Counties</p>	<h2>S.L. Gimbel Foundation Fund</h2> <h3>Grant Evaluation Form</h3>
Grant Period:	May 1, 2014 through April 30, 2015

Organization: Mizell Senior Center of Palm Springs

Contact Name: Jack Newby Title: Director of Development email: jackn@mizell.org

Phone Number: 760-323-5689 x118

Grant Period: May 1, 2014 through April 30, 2015

Award Amount: \$25,000.00

Grant Number: 20140273

Area Served: Eastern Coachella Valley, California Desert

- Total number of clients served through this grant funding: 303 unduplicated clients in the Eastern Coachella Valley.
- Describe the project's key outcomes and results based on your goals and objectives. Provide the number of clients served and other relevant statistics.

The purpose of the grant was to stabilize and expand home delivered meal service to seniors, age 60 and above in the Eastern Coachella Valley and unincorporated areas of Thermal, Mecca, and North Shore Salton Sea. The number of unduplicated clients in the unincorporated areas of Mecca, Thermal, and Salton Sea was 42.

At the beginning of the program, there were 40 unduplicated clients in the Eastern Coachella Valley which includes Coachella, Indio, LaQuinta, Mecca, Salton Sea, and Thermal. As of November 30, 2013, there were 216 unduplicated clients in the same area. By the end of this current grant term, there were a total of 303 unduplicated clients in this same area. This is an increase of over 500% from the beginning of the program and an increase of over 35% in the past year. This represents an additional 87 unduplicated clients during this grant term. Our goal was the addition of 25 additional clients. Therefore, the support of the S.L. Gimbel Foundation has significantly helped Mizell Senior Center in stabilizing and continuing expansion of this critical program to the most economically depressed areas of Eastern Coachella Valley.

The following are the objectives and key outcomes as outlined in the request:

Objective 1: Continue to identify frail and homebound seniors in Eastern Coachella Valley who are experiencing food insecurity and qualified for Meals on Wheels

During the grant term, we reallocated the time of our relief driver to begin more outreach in the Eastern Coachella Valley. Outreach was conducted at JFK Memorial Hospital, local mobile home parks, and area medical clinics. As a result, we were able to increase the number of clients served in the primary target areas of Coachella, and the unincorporated areas of Mecca, Thermal, and Salton Sea.

Objective 2: Begin Meals on Wheels Delivery service to at least 25 additional seniors who qualify for the program with five day per week delivery and meals for weekends and holidays.

The total number of additional unduplicated clients served during this grant term totaled 87.

Objective 3: Maintain Meals on Wheels Delivery Service to nearly 300 seniors in the Eastern Coachella Valley with a focus on the most underserved areas and document referrals made to additional resources and perform regular re-assessments and high client satisfaction.

Meals on Wheels Delivery Service to the Eastern Coachella Valley exceeded 300 unduplicated clients with a total of 303. We continued our focus on the poorest areas of the Eastern Coachella Valley.

All of our Meals on Wheels drivers are CPR certified and perform wellness checks on their visit. This includes an assessment of the client's health status, changes in behavior, and any additional needs. Mizell Senior Center works closely with Senior Advocates of the Desert and refers clients who need additional assistance to that agency.

Each client is reassessed quarterly in order to make sure they still qualify for the program. The program maintains an over 90% satisfaction rate with clients.

Projections based on a 15% growth from the previous year service anticipated that we would serve 22,030 home delivered meals to the Eastern Coachella Valley. Our actual total was 27,472 home delivered meals, an increase of 5,442 actual meals served over projections.

- What were the challenges and obstacles you encountered (if any) in attaining your goals & objectives? How did you overcome and/or address the challenges and obstacles? What were the lessons learned?

Because the seniors served by this program are defined to be "homebound", it is difficult to reach this population, especially in the Eastern Coachella Valley which is very rural in areas and has few services for seniors. We utilized outreach workers to make contact with area senior centers, medical providers, and other service providers to make contact with this population. In addition, other social service providers made referrals and well as referrals through the Riverside County Office On Aging.

Additional challenges relate to transportation of meals and route adjustment. Because of the rural nature of the Eastern Coachella Valley, especially East of Indio, there can be a great distance to travel between deliveries. This has required route adjustments and the need to replace vehicles because of the distance traveled each day.

We have been fortunate to obtain additional grant funding and private contributions to purchase two new delivery vehicles that also receive high gasoline mileage in order to help reduce costs. These vehicles replaced two older and larger vans that had high mileage, high maintenance and repair costs and high fuel costs. The savings in vehicle related costs was able to be reallocated to direct services.

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

Because of our outreach in the very rural areas of Eastern Coachella Valley, we have been able to establish trust and relationships with senior service providers in the area. As a result, we have been able to expand our congregate meal service to Mecca. This service started with serving 17 meals each month. As of April, we served 90 meals during that month. The congregate meal service provides an additional means of providing vital nutrition to the poorest areas of the Coachella Valley.

- Describe the overall effect this grant has had on your organization.

The expansion and stabilization of the Meals On Wheels program to previously underserved areas has continued to result in our exceeding the original goals of the Office On Aging Meals On Wheels Contract. As a result, this grant was critical in both the expansion of the program in previously underserved areas, and helped us meet our requirements for a "cash match" to be able to continue the program. Mizell Senior Center made a commitment that no senior would go on a waiting list for food who qualified for the Meals on Wheels program. We have been advised by the Riverside County Office on Aging that we are the only Home Delivered (Meals on Wheels) program in Riverside County that has made that commitment and we continue with no waiting list for food. We would not be able to keep this commitment without the support of foundations like the S.L. Gimbel Foundation, other local foundations and our generous private donors. We are on track this fiscal year to exceed our contract goals by at least 20%.

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

As a result of the continued expansion of the program into the most underserved areas, our program has received the attention of other local funders who have never provided funding to our program. For the first time, we received support from Desert Classic Charities (Major Golf Tournament) for our program.

As previously stated, as a result of this grant, we have been able to keep our commitment that no senior who qualifies for the program should go on a waiting list for food. According to the Riverside County Office on Aging, we are the only Meals on Wheels program in the entire county that does not have a waiting list.

Because of the program growth and increased support from private donors, we were able to raise \$60,000.00 at our annual fundraising event specifically for the purchase of two new vehicles. This is a great success, because we are able to show the overall need for the program and encourage donors to help us purchase delivery vehicles to help us to reduce program costs that could be utilized for direct client service.

Use of Funds: The objectives of the grant was to increase Meals on Wheels service to the Eastern Coachella Valley and especially the areas of Coachella, Thermal, Mecca, and North Shore Salton Sea. As outlined in the application, the funds would be utilized for food purchase, preparation, and delivery. The unit cost of each meal including food purchase, preparation, and delivery is \$8.10 per meal. Solely based upon the increase of 5,442 meals served over original budget projections, the total expenditure would be: \$44,080.20.

Demographics:

For the entire Eastern Coachella Valley service area, the demographics of clients served is:

White:	55%
Latino:	38%
Asian/Pac:	3%
Black:	3%
Decline:	1%

For Coachella and unincorporated areas of Eastern Coachella Valley, the demographics of clients served is:

Latino:	79%
White:	17%
Asian/Pac:	4%

All clients served are age 60 and over.

All clients are homebound and are therefore considered disabled.

All clients are in the economic categories of extremely low to very low income categories as defined by the US Department of Housing and Urban Development. Extremely Low Income is defined as a single person household with income at or below \$12,750 per year and Very Low Income is defined as a single person household with income at or below \$21,250 per year.

85% of clients served through the S.L. Gimbel Foundation grant funds were in the Extremely Low Income category.

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

Please see attached report.

- ❖ Please send copies of publicity and other promotional materials.
- ❖ All variances or time extensions must be approved by The Community Foundation's Grant Committee. Please contact us at 951-684-4194, ext. 114 immediately if a variance or extension becomes necessary.

Please return the completed form to:

Celia Cudiamat, Executive Vice President of Grants & Programs
3700 Sixth St., Suite 200, Riverside, CA 92501 or fax to 951-684-1911
Or email to: ccudiamat@thecommunityfoundation.net

Expense Summary May 1, 2014 - April 30, 2015				
The Community Foundation of Riverside and San Bernardino				
S.L. Gimbel Foundation Fund				
Line Item		Explanation *		Total
Food		27,472 meals served at \$2.63 per meal		\$72,251.36
Meal Supplies & Delivery		27,472 meals served at \$2.77 per meal		\$62,247.44
* meals served based solely on Eastern Coachella Valley.				
Note: Actual cost per meal served including all costs, labor, insurance, vehicle expenses, gasoline, maintenance, equipment is \$8.10 per meal. Total costs for meals served is 27,472 x \$8.10 = \$222,523.20				
Our total cash match requirement per meal is \$2.70. Therefore, For the meals served in the Eastern Coachella Valley, our cash match requirement is: \$74,174.40				
The S.L. Gimbel Foundation Grant was a significant help in meeting our cash match requirements.				
All receipts and program records are on file at Mizell Senior Center.				

MEALS ON WHEELS

Please contact our office for information on services.

Meals On Wheels Program Staff can be reached at any of the extensions listed below

760-323-5689

Extension 109

Extension 129

Extension 104

Or Toll Free:

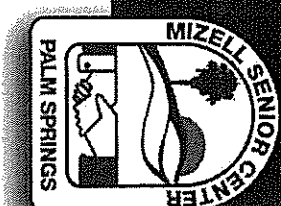
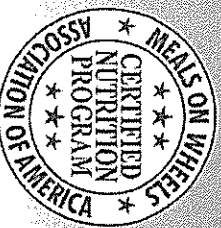
855-589-4646

Mizell Senior Center Website
www.mizell.org

Primary Funding for this program:
County Of Riverside Office On Aging

Supplemental Foundation Funding:
The California Wellness Foundation
S.L. Gimbel Foundation
Walmart Foundation
Jewish Federation of Palm Springs and Desert Area
Wells Fargo Foundation
Palm Springs Rotary Foundation

Essential Funding
Provided by general donations from Mizell Senior Center supporters and business partners



MEALS ON WHEELS



Mizell Senior Center
480 S. Sunrise Way
Palm Springs, CA 92262
(760) 323-5689

MEALS ON WHEELS

MEALS ON WHEELS is a food program available to homebound seniors of the Coachella Valley through a Federally funded Title III Senior Nutrition Program. The program is delivered and administered by the Mizell Senior Center in partnership with the Riverside County Office On Aging.

The program delivers daily nutritious meals to homebound seniors regardless of their ability to pay or their disability status.

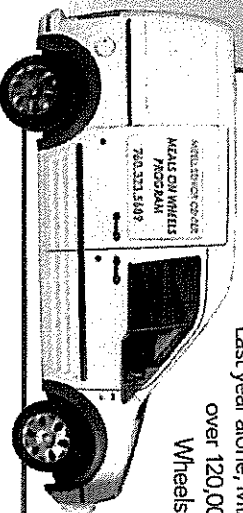
Mizell Meals On Wheels is not just a meal delivery. Each meal is delivered by a staff driver that is skilled and trained to recognize health issues and other problems. They are CPR certified, trained in signs of elder abuse and able to assist with connecting clients to our Outreach Coordinator for referral to additional services. Often they are the only link for that senior to the outside world and sometimes the only person the homebound senior sees on a daily basis. Each client receives at least two comprehensive in-home visits and two phone call assessments by our staff each year thus assuring that if needs, diet, or eligibility has changed we can adjust our service to fit their requirements.

As a component of the program we also provide monthly nutritional education through written literature to enhance the life and diet choices for our senior participants. All of our menus and recipes have been reviewed by our Registered Dietician and prepared under the direction of our Executive Chef. Clients needing additional assistance can be referred to our Dietician. Sodium content and other issues important to senior nutrition are part of every menu selection. Each meal contains a well-balanced variety with attractive presentation and is served in convenient reheatable containers.

Meals On Wheels is often the primary reason that many of our seniors are able to remain in their home and retain their independence and dignity. The senior is only asked to make a donation to the program and no one is ever turned away due to lack of funds.

Last year alone, Mizell Senior Center provided over 120,000 meals through the Meals On Wheels personal delivery and the

Congregate Meal programs administered at five senior centers in the Coachella Valley.



ELIGIBILITY

MEALS ON WHEELS ELIGIBILITY:

1. Must be 60 years of age or older
2. Must live in the cities of Palm Springs, Rancho Mirage, Indio, Cathedral City, Palm Desert, La Quinta, Coachella, Indian Wells, or South of the I-10 in Riverside County areas to the Salton Sea
3. Permanently or temporarily homebound due to isolation illness or disability
4. Live alone or with another person that cannot assist with meal preparation

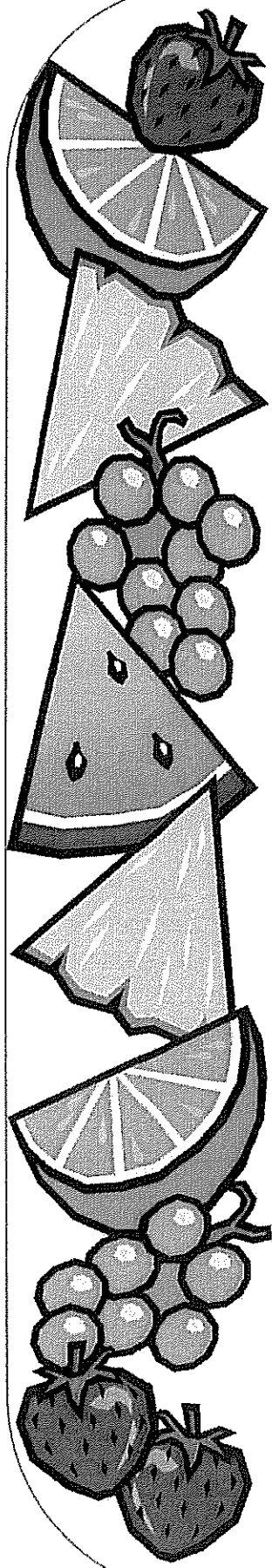
MEALS ON WHEELS SERVICES:

1. Nutritious meal delivered daily
2. Weekend meals available
3. Daily visits by trained route driver
4. Needs evaluation and referral
5. Birthday and Holiday recognition
6. Holiday Gift Program
7. Pet Food
8. Quarterly needs assessment

WHY REFER TO MEALS ON WHEELS:

1. Client receives daily visit
2. Meals designed for senior needs
3. Meals for low sodium restrictions
4. No financial means test
5. Donation only for meal service
6. Weekend meals available
7. Experienced, professional service
8. Bi-Lingual Staff
9. Quick service start – no waiting list
10. Long-term or short-term service dependent on client need

To learn more about Meals On Wheels or to refer a client see information on back of brochure



Mizell Senior Center

Meals On Wheels

From Palm Springs to North Shore

Meals on Wheels Clients Receive:

- ☞ Daily Nutritious Meal
- ☞ Weekend Meals Available
- ☞ Daily Visits
- ☞ Needs Evaluation & Referrals
- ☞ Birthday & Holiday Recognition
- ☞ Pet Food



Our drivers are trained and skilled to recognize health or other problems and assist those seniors in need through our dispatch procedures.

We provide nutritional education through one-on-one conversations and written literature to enhance the quality of life for the senior participants.

These services are coordinated with community organizations, businesses, and individuals in order to provide the best possible programs for those seniors in need.

Eligibility: *Seniors over 60 years of age and.....*

- ☞ Homebound due to an illness, disability, isolation or
- ☞ Individual with a disability who resides with a homebound meal recipient

To learn more about having daily meals delivered to your home, contact

Bobby Valadez, Outreach Coordinator

Mizell Senior Center ☺ 480 South Sunrise Way ☺ Palm Springs

E-Mail: BobbyV@Mizell.org

(760) 323-5689 x 109 or (855) 589-4646 (Toll Free)

Primary Funding

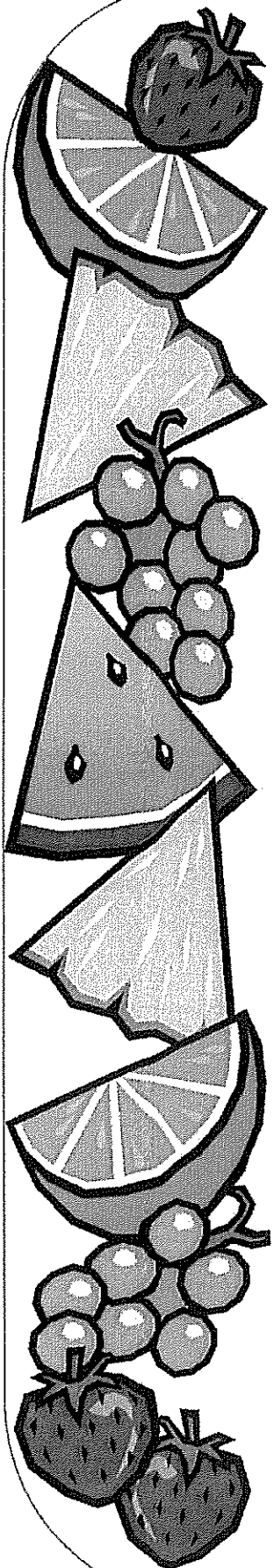
County of Riverside Office on Aging

Supplemental Funding

**The California Wellness Foundation ~ Palm Springs Rotary Foundation
Walmart Foundation ~ Jewish Federation of the Desert**

Also funded in part by a grant from the SL Gimbel Foundation Advised Fund at The Community Foundation Serving the Counties of Riverside and San Bernardino.

The Mizell Senior Center Nutrition Programs are funded in part by a grant from The California Wellness Foundation (TCWF.) Created in 1992 as a private, independent foundation, TCWF's mission is to improve the health of the people of California by making grants for health promotion, wellness education, and disease prevention.



Mizell Senior Center Meals On Wheels

Servicio de Palm Springs A North Shore

Cientes de Meals on Wheels Recibén:

- Comida Nutritiva diaria
- Comida para los fines de semana
- Visitas Diarias
- Recuerdo en Cumpleaños Y Ocasiones especiales.
- Comida para las mascotas (perro o gato)



Nuestros chóferes están entrenados para reconocer problemas y ayudar en caso de una emergencia.

Ayudamos con información escrita de Nutrición para educar a la comunidad en como mejorar sus habitos alimenticios.

Estos servicios están coordinados con organizaciones de la comunidad, negocios, Y individuales, para ayudar a la gente en como alimentarse mas saludable.

Calificaciones: Tener 60 o mas años de edad y

- Ser de casa por enfermedad, discapacidad, o aislamiento o
- Individuo con una desabilidad que vive con un participante elegible para el programa.

Para mas información comuníquese directamente con:
Bobby Valadez, en Nutrición al (760)323-5689 ext. 109 0 al (855) 589-4646 (Gratis)

Fundacion Principal
El Condado de Riverside Oficina de personas de la Tercera Edad

Fundacion Suplementaria
**The California Wellness Foundation ~ Palm Springs Rotary Foundation
Walmart Foundation ~ Federación Judía del Desierto**

Tambien fundado en parte por la beca de SL Gimbel Foundation Advised Fund at The Community Foundation sirviendo los condados de Riverside y San Bernardino.
Mizell Senior Center son financiados en parte por una beca de The California Wellness Foundation (TCWF). Creado en 1992 como una fundación privada independiente, misión de (TCWF) es mejorar la salud de la población de California por medio de subvenciones para la promoción de la salud, educación de salud y prevención de enfermedades.



Department of the Treasury
Internal Revenue Service

P.O. Box 2508, Room 4010
Cincinnati OH 45201

In reply refer to: 4077552845
Sep. 01, 2011 LTR 4168C 0
95-3464835 000000 00

00027666
BODC: TE

MIZELL SENIOR CENTER OF PALM
SPRINGS
480 S SUNRISE WAY
PALM SPRINGS CA 92262-7641



023311

Employer Identification Number: 95-3464835
Person to Contact: Mrs. Jones
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Mar. 22, 2011, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in May 1980.

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

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

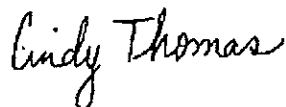
Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

4077552845
Sep. 01, 2011 LTR 4168C 0
95-3464835 000000 00
00027667

MIZELL SENIOR CENTER OF PALM
SPRINGS
480 S SUNRISE WAY
PALM SPRINGS CA 92262-7641

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

Sincerely yours,



Cindy Thomas
Manager, EO Determinations



Strengthening Inland Southern California through Philanthropy

S. L. Gimbel Foundation Fund

BOARD OF DIRECTORS

August 26, 2015

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Dr. Jonathan Lorenzo Yorba
President and CEO

Ms. Ginny Foat
Executive Director
Mizell Senior Center, Inc.
480 S. Sunrise Way
Palm Springs, CA 92262

Dear Ms. Foat:

Congratulations! A grant has been approved for **Mizell Senior Center, Inc.** in the amount of **\$30,000** from the S.L. Gimbel Foundation. The **performance period for this grant is September 1, 2015 to August 31, 2016.** Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

Meals on Wheels: To meet and sustain the growing needs in Eastern Coachella Valley for the Meals on Wheels and Congregate Nutrition programs.

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, please sign and date the enclosed copy and return the original copy to The Community Foundation within the next two weeks. Please retain a copy of the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. The **Grant Evaluation is due by September 15, 2016** and a copy will be available online.

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

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

Sincerely,

Celia Cudiamat
Executive Vice President of Programs

4234 Mizell Senior Center, Inc.

20150640

GIMB4



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

2015 S.L. Gimbel Foundation Fund

Grant Agreement

Organization: Mizell Senior Center, Inc.
Grant Amount: \$ 30,000 **Grant Number:** 20150640
Grant Period: September 1, 2015 to August 31, 2016 (Evaluations due by September 15, 2016)
Purpose: Meals on Wheels: To meet and sustain the growing needs in Eastern Coachella Valley for the Meals on Wheels and Congregate Nutrition programs.

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.

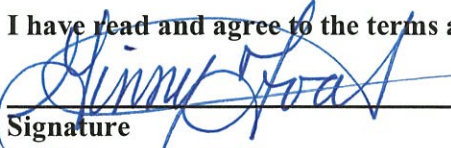
8. Termination

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.



Signature

GINNY FOAT

Printed Name

08/31/2015

Date

EXECUTIVE DIRECTOR

Title

Organization: 4234 Mizell Senior Center, Inc.
Grant Number: 20150640



480 South Sunrise Way • Palm Springs • California 92262-7641
Phone (760) 323-5689 • Fax (760) 320-9373

www.mizell.org • info@mizell.org
Tax ID #95-3464835



August 31, 2014

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

Re: The Community Foundation - S. L. Gimbel Foundation
Grant No: 20150640

Dear Ms. Cudiamat:

Enclosed please find the signed Grant Agreement for the 2015 S.L. Gimbel Foundation Fund to support our growing Meals on Wheels and Congregate Nutrition Programs in the Eastern Coachella Valley.

We appreciate the support of The S. L. Gimbel Foundation and The Community Foundation serving the counties of Riverside and San Bernardino. We look forward to a successful project and expanding Meals On Wheels service to meet and sustain the growing need in the low income areas of Eastern Riverside County.

Sincerely,

Ginny Foat
Executive Director

Executive Committee

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President
RICK PETERSON
Executive Vice President
MARK MARSHALL
First Vice President
HENRY HUDSON
Second Vice President
BRIAN WACHS, CPA
Vice President of Membership
DEBBIE BRANDT, CPA
Treasurer
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Director of Finance
Ian Murray
Director of Programs
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Executive Chef

People Serving People

The Community Foundation

Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS September 29, 2015

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Chief Financial Officer

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Dr. Paulette Brown-Hinds

Rabbi Hillel Cohn

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Andrew Jaramillo

Dr. Albert Karnig

D. Matthew Pim

Teresa Rhyne

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Ms. Ginny Foat
Executive Director
Mizell Senior Center, Inc.
480 S. Sunrise Way
Palm Springs, CA 92262

Dear Ms. Foat:

The Community Foundation is pleased to enclose a grant check for **\$30,000** from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned. The completed Grant Evaluation form is due by September 15, 2016 and will be available online on The Community Foundations website under Grants/Forms. Please note that any grant variances or extensions must be requested in writing and in advance. Any remaining grant funds must be returned to The Community Foundation at the end of the grant period.

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

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

Sincerely,



Celia Cudiamat
Executive Vice President of Programs

20150640

39684

GIMB4

Dr. Jonathan Lorenzo Yorba
President and CEO



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

EMV[®] Check Fraud Protection for Business

39684

PAY * Thirty Thousand and no/100 *

TO THE ORDER OF

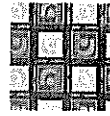
DATE

AMOUNT

08/27/2015

\$ ****30,000.00

Mizell Senior Center, Inc.
 480 S. Sunrise Way
 Palm Springs, CA 92262



Jonathan Lanza Juba
Celia Andriamant
 AUTHORIZED SIGNATURE

Security features. Details on back.

⑈039684⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

39684

4234 Mizell Senior Center, Inc.

08/27/2015 039684

20150640 08/25/2015 Meals on Wheels
 GIMB S.L. Gimbel Foundation Advised Fund

30,000.00 30,000.00

CHECK TOTAL: \$ ****30,000.00

The Community Foundation

39684

4234 Mizell Senior Center, Inc.

08/27/2015 039684

20150640 08/25/2015 Meals on Wheels
 GIMB S.L. Gimbel Foundation Advised Fund

30,000.00 30,000.00

CHECK TOTAL: \$ ****30,000.00