



# 2015 S.L. Gimbel Foundation Fund Grant Application

Internal Use Only:  
Grant: \$25,000

## Organization / Agency Information

20150353

<b>Organization/Agency Name:</b> OPARC		
<b>Physical Address:</b> 9029 Vernon Ave.		<b>City/State/Zip</b> Montclair, CA 91763
<b>Mailing Address:</b> 9029 Vernon Ave.		<b>City/State/Zip</b> Montclair, CA 91763
<b>CEO or Director:</b> Andrea Erickson		<b>Title:</b> President & CEO
<b>Phone:</b> (909) 985-3116 ext. 125	<b>Fax:</b> (909) 985-8579	<b>Email:</b> aerickson@oparc.org
<b>Contact Person:</b> Andrea Erickson		<b>Title:</b> President & CEO
<b>Phone:</b> (909) 985-3116 ext. 125	<b>Fax:</b> (909) 985-8579	<b>Email:</b> aerickson@oparc.org
<b>Web Site Address:</b> www.oparc.org		<b>Tax ID:</b> 95-1943396

## Program / Grant Information

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

<b>Program/Project Name:</b> Transportation Safety Program			<b>Amount of Grant Requested:</b> \$25,000
<b>Total Organization Budget:</b> \$11,117,015	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> 87	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C / Column A x 100):</b> 11	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b> 13
<b>Purpose of Grant Request (one sentence):</b> To install vehicle maintenance and safety monitoring devices into 25 vehicles that transport approximately 500 OPARC disabled adult participants everyday.			
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> N/A			

## Signatures

<b>Board President / Chair: (Print name and Title)</b> Frederick (Rick) Meier, Board Chairman	<b>Signature:</b> 	<b>Date:</b> 3/13/15
<b>Executive Director/President: (Print name and Title)</b> Andrea Erickson, Executive Director	<b>Signature:</b> 	<b>Date:</b> 3/13/15

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## 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?*

OPARC's mission is to enable people with disabilities to achieve their full potential. We transform lives by providing training, employment, and support. OPARC has been serving the community since 1950.

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

In the past three years, OPARC has achieved the following results:

- Served more than 800 adults with disabilities per month
- Maintained or placed approximately 70% of participants in some form of employment;
- Developed a three-year strategic Fund Development plan; the first in the organization's history
- Brought the organization from a financial decline and deficit to a healthy surplus that is being used as part of the organization's safety net plan

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

OPARC operates out of eight locations in San Bernardino and East Los Angeles County; we have three sites in Montclair, as well as sites in Ontario, Rancho Cucamonga, Upland, Walnut, and San Bernardino. Our 800 program participants experience a wide range of disabilities, including, but not limited to: Down syndrome, intellectual disability, epilepsy, cerebral palsy, autism, and other disabling conditions closely related to intellectual disability. Participants often have one or more physical disabilities combined with serious medical conditions. Key program activities include employment, community integration, behavior management support, basic academic instruction, leisure/recreation activities, speech pathology services, multi-sensory experiences, and assistance with activities of daily living.

### **II. Project Information:**

A) Statement of Need

*1. Specify the community need you want to address and are seeking funds for.*

OPARC transports approximately 500 disabled adults everyday, five days per week. These individuals and their families rely on OPARC to provide a safe and secure transportation experience. In order to help ensure this is occurring, OPARC is instituting a Transportation Safety Program. This program is critical to ensure the safety of both OPARC participants and staff.

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?*

As part of the Transportation Safety Program, OPARC's goal is to increase the safety of its 500 participants and dozens of staff who utilize the organization's vehicles everyday. We are seeking to raise funds to install vehicle maintenance and safety monitoring devices in every vehicle. Our top priority, and where grant funding will be utilized, is to install these devices into the 25 vehicles that transport OPARC participants most frequently. These devices are called "Ford Crew Chiefs". They have the capability to run diagnostics and alert staff when maintenance is needed on the vehicle. It has a GPS tracking system to ensure OPARC

leadership know exactly where the vehicles are at all times. It monitors the driver's speed and idling time to ensure they are not driving too fast and also not leaving participants in the car too long.

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: Improve the safety of OPARC staff and participant who utilize the organization's vehicles.

Activities: Upon receipt of grant funding, purchase and install the "Ford Crew Chiefs" and train key staff members in using and monitoring the devices.

Objective II: Reduce vehicle incidences within the first year of installing the "Ford Crew Chiefs"

Activities: Regular diagnostics will be run to ensure regular maintenance and service is up-to-date on all of the vehicles.

Objective III: Ensure OPARC participants are safe throughout their time in the vehicles.

Activities: The "Ford Crew Chiefs" will add a layer of protection not only in how the vehicles are operated but also ensuring that staff do not leave participants in the vehicle unattended or leave them in the vehicles for longer periods of time beyond the necessary transportation time.

*Provide a timeline for implementing the project?*

Upon receipt of grant funding, OPARC will immediately purchase and install the Ford Crew Chiefs. Installation will be complete within one month of receipt of grant funding. During months two and three, all appropriate staff will be trained in proper use of the Ford Crew Chiefs and protocols will be established for regular monitoring. The new devices will be fully operational from month four and ongoing. It is anticipated these devices will be utilized for a minimum of ten years.

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.*

OPARC serves adults with developmental and intellectual disabilities, one of the most disenfranchised, vulnerable, and economically challenged populations in the state.

OPARC's participants are considered low-income, as verified through referrals from Regional Centers. OPARC clients experience a wide range of disabilities, including but not limited to: Down syndrome, intellectual disability, epilepsy, cerebral palsy, autism, and other disabling conditions closely related to intellectual disability.

Through this grant, OPARC will better serve 500 participants, all of whom are adults. Approximately 250 of the adults who will be transported will be going to and from employment activities and the remaining 250 participants will be visiting the local community—going to local stores and shopping centers, parks, and more.

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?*

Other agencies may provide vehicle tracking systems but the Ford Crew Chief is the most innovating. Other similar agencies in the community include PVW and GoodWill. OPARC partners with more than 100 businesses to build employment opportunities for its

participants. We have a cooperative working relationship with local universities that provide clinical interns to OPARC.

C) Project Outcomes and Evaluation

1. What are the key anticipated outcomes of the project and impact on participants?

The key outcomes of the Transportation Safety Program are as follows:

- Vehicle incidents will reduce by 50%
- 95% of vehicles will undergo regular maintenance
- Staff will know where every OPARC vehicle is at any given time

2. How will you know if you have achieved the expected outcomes?

OPARC will know it has achieved its expected outcomes after conducting a comparative analysis of its transportation program before and after installation of the Crew Chiefs.

3. How will progress towards the objectives be tracked and outcomes measured?

The Director of Transportation will conduct monthly evaluations and will provide a year-end analysis of the Transportation Program. Results will be based on comparing existing vehicle incident and maintenance reports and comparing to the results after the Ford Crew Chiefs have been installed. Additionally, the Director of Transportation will provide monthly reports to the Executive Director detailing the results around how the OPARC drivers have performed in controlling their speed and limiting idling time in the vehicles.

D) How will you use the grant funds?

Grant funds will be used to purchase 25 Ford Crew Chiefs and the first year of the annual maintenance fee.

### 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.*

Each device costs \$800 per unit and only \$200 per year thereafter for the annual maintenance fee. Therefore, the annual expense to OPARC for the 25 devices, after the first year, will total just \$5,000. The cost of these funds will be covered through cost savings of better maintaining the organization's vehicles.

### 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?*

The OPARC volunteer Board of Directors is comprised of community members who provide support in business leadership, civic, education, food industry, health, legal, financial, construction, and more. The committees of the board include: Finance, Governance, Fund Development, and Facilities. The board makes decisions by vote at each board meeting, where typically the full board has consensus when making decisions.

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

Andrea Erickson, President & CEO, has been a leader in the field of disabilities in a career spanning three decades. She turned OPARC's financial situation from negative to net positive in less than one year. Each of the program directors for the key program areas have been working in their fields for well over a decade each and each maintain a minimum of a Bachelor's degree in their areas of expertise.

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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
Ford Crew Chief Hardware	\$800 per device for 25 devices = \$20,000  This is the device that will be installed into each OPARC vehicle and used to monitor the vehicle.	\$0 (NOTE: OPARC will be purchasing other devices in the future but this grant is for the 25 vehicles that mostly transport OPARC participants)	\$0	\$20,000	\$20,000
Crew Chief Annual Maintenance	\$200 per device for 25 devices = \$5,000 This is to provide the ongoing service of the monitoring, including software updates.	\$0	\$0	\$5,000	\$5,000
<b>TOTALS:</b>		\$0	\$0	\$25,000	\$25,000

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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
Weingart Foundation	\$62,500
John Gogian Family Foundation	\$15,000
San Manuel	\$10,000
Sidney Stern Memorial Trust	\$5,000
Edison International	\$5,000
James L. Whilte Foundation	\$5,000
Claremont Community Foundation	\$2,000

### *Pending*

Name of Funder: Foundation, Corporation, Government	Amount	Decision Date
Knights of Columbus	\$10,000	Spring 2015
Ontario Community Foundation	\$10,000	Summer 2015
Kaiser Foundation	\$6,000	Summer 2015
Kenneth T. and Eileen L. Norris Foundation	\$25,000	Summer 2015
Chevron	\$10,000	Summer 2015
Union Bank	\$5,000	Summer 2015

**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	\$150,378	1.3	Program Fees	\$1,457,467	12.9
Fundraising/Special Events	\$15,315	0.1	Interest Income	\$46,235	0.4
Corp/Foundation Grants	\$186,906	1.7	Other:	\$26,292	0.2
Government Grants	\$9,368,707	82.8	Other:	\$59,010	0.6

**Notes:**

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### VII. Financial Analysis

Agency Name: OPARC  
 Most Current Fiscal Year (Dates): From 07/01/2013 To: 06/30/2014

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
\$ 10,647,584	\$ 9,310,849	\$ 1,152,463	\$ 184,272

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

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

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	87.4 %	10.8 %	1.7 %

**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 (from cover page)	Column C, Management & general expenses per 990 above	Differential
11.8 %	10.8 %	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.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$2,524,511	\$ 1,031,083	473,854	7.5

**Excess or Deficit for the Year:**

<b>Excess or (Deficit) Most recent fiscal year end</b>	<b>Excess or (Deficit) Prior fiscal year end</b>
\$609,282	\$505,601

**Notes:** The budget surplus was put into reserves for the organization.

**VIII. Application submission check list:**

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



# OPARC BOARD OF DIRECTORS - ROSTER

*2014-2015*

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## OFFICERS

### CHAIRMAN

1. **Frederick (Rick) Meier** – Retired California Highway Patrol

### VICE-CHAIR

2. **Rev. James Pike** – Pastor, Grace Lutheran Church

### TREASURER

3. **Nancy DeDiemar** – Retired business owner

### SECRETARY

4. **Janet Pasker** – Retired Southern California Edison

## MEMBERS AT LARGE

5. **Denise Carrington** – Owner of D. Carrington Insurance Agency (Farmers)
6. **James Daniels** – Retired Community Development Director
7. **Anne Dutrey** – City of Chino Hills
8. **Susan Grainger** – Vavrinek, Trine, Day & Co. LLP
9. **Sean Henry** – Rowland Water District
10. **Robert J. Howdyshell** – County of Riverside
11. **Alexis Minter** – Business owner
12. **Sue Ovitt** - Chaffey Joint Union High School District Governing Board
13. **Holly Preble** – Pitzer College
14. **Shirley A. Simmons** – President/CEO, Integrated Strategies Group: Consultant for Profit and Non-Profit Organizations
15. **Nils Sundberg** – General Contractor, Sundberg Construction, LLC
16. **Nancy Tragarz** – Council Member, City of Walnut
17. **Stacy Waltman** – Pacific Western Bank

**OPARC**  
**BUDGET COMPARISON (OPERATING)**  
**FISCAL YEAR ENDING: JUNE 30, 2014**

	Actuals Most Recently Completed Year 6/30/2014	Budget Projections Current Year 6/30/2014	Variance
	ACTUAL	BUDGET	% VAR
<b>REVENUES &amp; PUBLIC SUPPORT</b>			
<b>REVENUES</b>			
Service Fees	8,945,852	9,055,344	-1%
Contract Income	1,382,676	1,231,519	12%
Transportation Income	422,854	434,451	-3%
Food Service Income	104,594	108,527	-4%
Other Income & Interest	50,040	9,500	427%
Gain (Loss) on Assets	20,702	-	0%
<b>TOTAL REVENUES</b>	<b>\$ 10,926,718</b>	<b>\$ 10,839,341</b>	<b>1%</b>
<b>PUBLIC SUPPORT</b>			
Contributions & Gifts	88,705	100,000	-11%
Membership Fees	4,131	6,500	-36%
Grant Income	61,000	75,000	-19%
Special Events	15,315	67,000	-77%
Donated Goods & Services	44,448	43,000	3%
Start-Up Funds	10,000	10,000	0%
<b>TOTAL PUBLIC SUPPORT</b>	<b>\$ 223,600</b>	<b>\$ 301,500</b>	<b>-26%</b>
ASSETS RELEASED FROM RESTRICTIONS	52,423	-	0%
<b>TOTAL REVENUES &amp; PUBLIC SUPPORT</b>	<b>\$ 11,202,741</b>	<b>\$ 11,140,841</b>	<b>1%</b>
<b>EXPENSES</b>			
<b>PERSONNEL COSTS</b>			
Salaries & Wages	5,433,914	5,524,652	-2%
Payroll Taxes	461,977	483,636	-4%
Employee Benefits	586,590	610,445	-4%
<b>TOTAL PERSONNEL COSTS</b>	<b>\$ 6,482,481</b>	<b>\$ 6,618,733</b>	<b>-2%</b>
<b>BUILDING EXPENSE</b>			
Building - Insurance	59,954	54,177	11%
Building - Interest Expense	148,450	142,741	4%
Building - Maintenance & Repairs	169,928	155,000	10%
Building - Lease Expense	321,212	329,016	-2%
Building - Utilities	140,019	140,750	-1%
<b>TOTAL BUILDING EXPENSE</b>	<b>\$ 839,563</b>	<b>\$ 821,684</b>	<b>2%</b>
<b>CLIENT LABOR COST</b>			
Client Wages	1,018,873	986,659	3%
Client Payroll Taxes	78,126	75,479	4%
Client Worker's Comp	152,281	126,884	20%
<b>TOTAL CLIENT LABOR COST</b>	<b>\$ 1,249,280</b>	<b>\$ 1,189,023</b>	<b>5%</b>
<b>OTHER EXPENSES</b>			
Communication Expense	89,548	87,500	2%
Direct Program Expense	114,538	97,011	18%
Equipment Rent & Repairs	36,593	33,900	8%
Professional Outside Services	483,602	452,176	7%
Recruitment & Staff Retention	23,170	26,400	-12%
Staff Development & Incentives	32,340	36,535	-11%
Staff Mileage	143,216	144,200	-1%
Supplies & Materials	130,397	143,700	-9%
Vehicle Expense	443,810	437,500	1%
Other Business Expenses	136,038	149,342	-9%
Fundraising & Special Events Expense	48,833	59,500	-18%
Assets Purchased Under \$2,500	24,826	59,500	-58%
Donated Goods & Services	44,448	43,000	3%
Depreciation & Amortization Expense	378,341	364,300	4%
<b>TOTAL OTHER EXPENSES</b>	<b>\$ 2,129,702</b>	<b>\$ 2,134,564</b>	<b>0%</b>
<b>TOTAL EXPENSES including DEPRECIATION</b>	<b>\$ 10,701,026</b>	<b>\$ 10,764,004</b>	<b>-1%</b>
<b>NET SURPLUS / (DEFICIT)</b>	<b>\$ 501,715</b>	<b>\$ 376,837</b>	<b>33%</b>

**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 U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	242,774		242,774	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	6,229,205	5,837,639	391,566	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	16,226	15,566	660	
9 Other employee benefits	767,473	730,038	34,790	2,645
10 Payroll taxes	476,084	431,805	44,279	
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting	28,513		28,513	
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.)	455,090	188,846	136,244	130,000
12 Advertising and promotion	19,712	13,151	6,422	139
13 Office expenses	228,105	163,672	54,095	10,338
14 Information technology	89,548	65,391	24,157	
15 Royalties				
16 Occupancy	634,589	595,906	38,683	
17 Travel	517,043	503,847	13,196	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	18,317	12,162	6,155	
20 Interest	157,330	116,863	39,455	1,012
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	375,263	324,645	50,618	
23 Insurance	153,349	135,396	17,863	90
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 DIRECT PROGRAM EXPENSE	114,538	112,674	1,519	345
b FUNDRAISING/SPECIAL EVENT	39,837		134	39,703
c EQUIPMENT RENT & REPAIR	36,592	29,041	7,551	
d EXPENDABLE PROP & EQUIP	24,826	14,912	9,914	
e All other expenses	23,170	19,295	3,875	
25 Total functional expenses. Add lines 1 through 24e	10,647,584	9,310,849	1,152,463	184,272
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Internal Revenue Service

Department of the Treasury

District  
Director

300 N. Los Angeles Street, MS 7043  
Los Angeles, CA 90012

OPARC  
8939 VERNON AVENUE, SUITE L  
MONTCLAIR, CA 91763-1654

Person to Contact:  
L BARRAGAN  
Telephone Number:  
(213) 894-2336  
Refer Reply to:  
EO(1016)98  
Date:  
NOVEMBER 6, 1998  
EIN: 95-1943396

Dear Taxpayer:

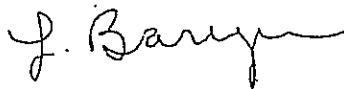
This letter is in response to your request for a copy of the determination letter for the above named organization.

Our records indicate that this organization was recognized to be exempt from Federal income tax in NOVEMBER 1959 as described in Internal Revenue Code Section 501(c)(3). It is further classified as an organization that is not a private foundation as defined in Section 509(a) of Code, because it is an organization described in Section 509(a)(2).

The exempt status for the determination letter issued in NOVEMBER 1959 continues to be in effect.

If you need further assistance, please contact our office at the above address or telephone number.

Sincerely,



Disclosure Assistant



The  
Community  
Foundation

Strengthening Inland Southern California through Philanthropy

*S. L. Gimbel Foundation Fund*

**BOARD OF DIRECTORS**

May 26, 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

Teresa Rhyne

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Dr. Jonathan Lorenzo Yorba  
President and CEO

Ms. Andrea Erickson  
President & CEO  
OPARC  
9029 Vernon Ave.  
Montclair, CA 91763

Dear Ms. Erickson:

Congratulations! A grant has been approved for **OPARC** in the amount of **\$25,000** from the S.L. Gimbel Foundation. The **performance period for this grant is June 1, 2015 to May 30, 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:

*Transportation Safety Program: To install vehicle maintenance and safety monitoring devices into 25 vehicles that transport approximately 500 OPARC disabled adults participants every day.*

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

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

If you have any questions, please call me at 951-684-4192 ext. 114 or email me at [ccudiamat@thecommunityfoundation.net](mailto:ccudiamat@thecommunityfoundation.net).

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

6161 OPARC

20150353

GIMB2



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

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

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

**Grant Agreement**

**Organization:** OPARC

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

**Grant Number:** 20150353

**Grant Period:** June 1, 2015 to May 30, 2016 (Evaluations due by June 15, 2016)

**Purpose:** **Transportation Safety Program: To install vehicle maintenance and safety monitoring devices into 25 vehicles that transport approximately 500 OPARC disabled adults participants every day.**

**1. Use of Grant Funds**

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

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

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

**2. Payment of Grant Funds**

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

**3. Certification and Maintenance of Exempt Organization Status**

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

**4. Final Report and Records**

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

**5. Grantee's Financial Responsibilities**

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

**6. Publicity**

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

The credit line of "Made possible in part by a grant from the **"S.L. Gimbel Foundation Advised Fund at The Community Foundation – Inland Southern California"** is suggested. When your donors are listed in printed materials, include the S.L. Gimbel Foundation Advised Fund at The Community Foundation in the appropriate contribution size category. When publishing our name, please note the "The" at the beginning of our name is a legal part of our name. It should always be used and capitalized. Attaching our logo is also appreciated. Our logo can be downloaded from our website at [www.thecommunityfoundation.net](http://www.thecommunityfoundation.net).

**7. Indemnification**

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

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

**8. Termination**

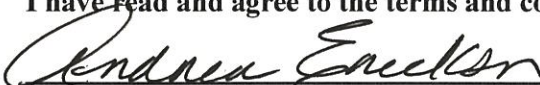
The Community Foundation may terminate this agreement, withhold payments, or both at any time, if, in the Community Foundation's judgment: a) The Community Foundation is not satisfied with the quality of the Grantee's progress toward achieving the project goals and objectives; b) the Grantee dissolves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

**9. Limitation of Support**

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

\*\*\*\*\*

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



Signature



Date

ANDREA Erickson

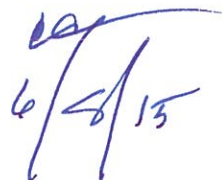
Printed Name

President / CEO

Title

Organization: 6161 OPARC

Grant Number: 20150353





Strengthening Inland Southern California through Philanthropy

## S. L. Gimbel Foundation Fund

### BOARD OF DIRECTORS

June 8, 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

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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. Andrea Erickson  
President & CEO  
OPARC  
9029 Vernon Ave.  
Montclair, CA 91763

Dear Ms. Erickson:

The Community Foundation is pleased to enclose a grant check for **\$25,000** from the S. L. Gimbel Foundation, a component fund at The Community Foundation. By cashing the grant check, you are agreeing to the conditions stated under the *Terms of Grant* which you have signed and returned. The completed Grant Evaluation form is due by June 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

20150353

39265

GIMB2

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

39265

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

TO THE ORDER OF

DATE

AMOUNT

05/26/2015

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

OPARC  
 9029 Vernon Ave.  
 Montclair, CA 91763



*Jonathan Lorenzo Garcia*  
*Chris Anderson*  
 AUTHORIZED SIGNATURE

⑈039265⑈ ⑆122234149⑆ 244124437⑈

The Community Foundation

39265

6161 OPARC

05/26/2015 039265

20150353 05/26/2015 Transportation Safety Program  
 GIMB S.L. Gimbel Foundation Advised Fund

25,000.00 25,000.00

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

The Community Foundation

39265

6161 OPARC

05/26/2015 039265

20150353 05/26/2015 Transportation Safety Program  
 GIMB S.L. Gimbel Foundation Advised Fund

25,000.00 25,000.00

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